InfoView User's Guide

InfoView 6.5

Windows and UNIX

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Maximizing Your Information Resources

Overview

Information, services, and solutions

The Business Objects business intelligence solution is supported by thousands of pages of documentation, available from the products, on the Internet, on CD, and by extensive online help systems and multimedia.

Packed with in-depth technical information, business examples, and advice on troubleshooting and best practices, this comprehensive documentation set provides concrete solutions to your business problems.

Business Objects also offers a complete range of support and services to help maximize the return on your business intelligence investment. See in the following sections how Business Objects can help you plan for and successfully meet your specific technical support, education, and consulting requirements.

Information resources

Whatever your Business Objects profile, we can help you quickly access the documentation and other information you need.

Where do I start?

Below are a few suggested starting points; there is a summary of useful web addresses on page 12.

Documentation Roadmap

The Documentation Roadmap references all Business Objects guides and multimedia, and lets you see at a glance what information is available, from where, and in what format.

View or download the **Business Objects Documentation Roadmap** at www.businessobjects.com/services/documentation.htm

Documentation from the products

You can access electronic documentation at any time from the product you are using. Online help, multimedia, and guides in Adobe PDF format are available from the product Help menus.

Documentation on the web

The full electronic documentation set is available to customers with a valid maintenance agreement on the **Online Customer Support** (OCS) website at www.businessobjects.com/services/support.htm

Buy printed documentation

You can order printed documentation through your local sales office, or from the online **Business Objects Documentation Supply Store** at www.businessobjects.com/services/documentation.htm

Search the Documentation CD

Search across the entire documentation set on the Business Objects Documentation CD shipped with our products. This CD brings together the full set of documentation, plus tips, tricks, multimedia tutorials, and demo materials.

Order the Documentation CD online, from the Business Objects Documentation Supply Store, or from your local sales office.

Multimedia

Are you new to Business Objects? Are you upgrading from a previous release or expanding, for example, from our desktop to our web solution? Try one of our multimedia quick tours or Getting Started tutorials. All are available via the Online Customer Support (OCS) website or on the Documentation CD.

How can I get the most recent documentation?

You can get our most up-to-date documentation via the web. Regularly check the sites listed below for the latest documentation, samples, and tips.

Tips & Tricks

Open to everyone, this is a regularly updated source of creative solutions to any number of business questions. You can even contribute by sending us your own tips.

www.businessobjects.com/forms/tipsandtricks_login.asp

Product documentation

We regularly update and expand our documentation and multimedia offerings. With a valid maintenance agreement, you can get the latest documentation – in seven languages – on the Online Customer Support (OCS) website.

Developer Suite Online

Developer Suite Online provides documentation, samples, and tips to those customers with a valid maintenance agreement and a Developer Suite license via the Online Customer Support (OCS) website.

Send us your feedback

Do you have a suggestion on how we can improve our documentation? Is there something you particularly like or have found useful? Drop us a line, and we will do our best to ensure that your suggestion is included in the next release of our documentation: documentation@businessobjects.com

NOTE

If your issue concerns a Business Objects product and not the documentation, please contact our Customer Support experts. For information about Customer Support visit: www.businessobjects.com/services/support.htm

Services

A global network of Business Objects technology experts provides customer support, education, and consulting to ensure maximum business intelligence benefit to your business.

How we can support you?

Business Objects offers customer support plans to best suit the size and requirements of your deployment. We operate three global customer support centers:

- Americas: San Jose, California and Atlanta, Georgia
- Europe: Maidenhead, United Kingdom
- Asia: Tokyo, Japan and Sydney, Australia

Online Customer Support

Our Customer Support website is open to all direct customers with a current maintenance agreement, and provides the most up-to-date Business Objects product and technical information. You can log, update, and track cases from this site using the Business Objects Knowledge Base.

Having an issue with the product?

Have you exhausted the troubleshooting resources at your disposal and still not found a solution to a specific issue?

For support in deploying Business Objects products, contact Worldwide Customer Support at: www.businessobjects.com/services/support.htm

Looking for the best deployment solution for your company?

Business Objects consultants can accompany you from the initial analysis stage to the delivery of your deployment project. Expertise is available in relational and multidimensional databases, in connectivities, database design tools, customized embedding technology, and more.

For more information, contact your local sales office, or contact us at: www.businessobjects.com/services/consulting.htm

Looking for training options?

From traditional classroom learning to targeted e-learning seminars, we can offer a training package to suit your learning needs and preferred learning style. Find more information on the Business Objects Education website: www.businessobjects.com/services/education.htm

Useful addresses at a glance

Address	Content
Business Objects Documentation www.businessobjects.com/services/documentation.htm	Overview of Business Objects documentation. Links to Online Customer Support, Documentation Supply Store, Documentation Roadmap, Tips & Tricks, Documentation mailbox.
Business Objects Documentation mailbox documentation@businessobjects.com	Feedback or questions about documentation.
Product documentation www.businessobjects.com/services/support.htm	The latest Business Objects product documentation, to download or view online.
Business Objects product information www.businessobjects.com	Information about the full range of Business Objects products.
Developer Suite Online www.techsupport.businessobjects.com	Available to customers with a valid maintenance agreement and a Developer Suite license via the Online Customer Support (OCS) website. Provides all the documentation, latest samples, kits and tips.
Knowledge Base (KB) www.techsupport.businessobjects.com	Technical articles, documents, case resolutions. Also, use the **Knowledge Exchange** to learn what challenges other users – both customers and employees – face and what strategies they find to address complex issues. From the Knowledge Base, click the Knowledge Exchange link.
Tips & Tricks www.businessobjects.com/forms/tipsandtricks_login.asp	Practical business-focused examples.

Address	Content
Online Customer Support www.techsupport.businessobjects.com www.businessobjects.com/services	 Starting point for answering questions, resolving issues. Information about registering with **Worldwide Customer Support**.
Business Objects Education Services www.businessobjects.com/services/education.htm	The range of Business Objects training options and modules.
Business Objects Consulting Services www.businessobjects.com/services/consulting.htm	Information on how Business Objects can help maximize your business intelligence investment.

About this guide

This guide describes InfoView, the Business Objects product that provides an overview of all the documents that you can access in the corporate repository. It also allows you to view, manage, and distribute these documents. You use InfoView in a web browser.

Audience

This guide is intended for users who want to view and distribute documents using InfoView.

Conventions used in this guide

The conventions used in this guide are described in the table below.

Convention	Indicates
`This font`	Code, SQL syntax, computer programs. For example: `@Select(Country\Country Id)`. This font is also used for all paths, directories, scripts, commands and files for UNIX.
`Some code` ↵ `more code`	Placed at the end of a line of code, the symbol (↵) indicates that the next line should be entered continuously with no carriage return.
$DIRECTORYPATHNAME	The path to a directory in the Business Objects installation/configuration directory structure. For example: • $INSTALLDIR refers to the Business Objects installation directory. • $LOCDATADIR refers to a subdirectory of the BusinessObjects installation directory called locData.

Introduction to InfoView

chapter 1

Overview

InfoView is a business intelligence portal that collects and consolidates your company's Business Intelligence information and presents it in a secure, organized, and personalized view to users inside and outside your organization.

With InfoView you can customize the look of your interface, manage, save, distribute, print and schedule documents for automated processing by Broadcast Agent. You can do all this from your office, home, or around the world, using your corporate intranet, extranet, or the World Wide Web. It is both a stand-alone business intelligence portal (BIP), and a BI-content provider for enterprise information portals (EIPs).

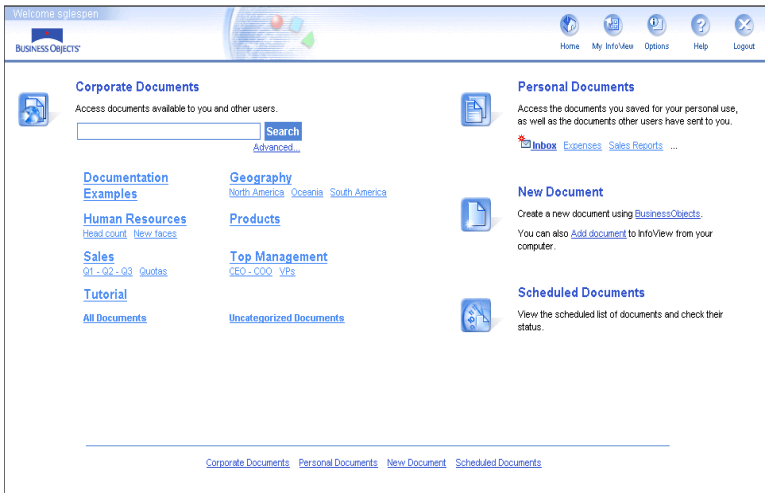
InfoView enables you to access business information created using BusinessObjects and WebIntelligence.

What is InfoView?

InfoView is your personal gateway to your corporate information capital. It allows you to access documents generated from your corporate data storage, from your office, home, or around the world, using your corporate intranet, extranet, or the World Wide Web.

To use InfoView, you do not need to install any additional software on your computer. All you need is a standard Internet browser.

At the core of InfoView are the document lists that give you an instant overview of all the documents available to you in the corporate database.



InfoView includes two document areas:

- The Corporate Documents page is a catalog of all the documents that you are allowed to access in the corporate repository, the centralized BusinessObjects storage and distribution mechanism that manages universes, user information and document exchange.
- The Personal Documents page lists the documents you have saved for your own personal use.

  Within this page, the Inbox stores the documents that other users have sent you.

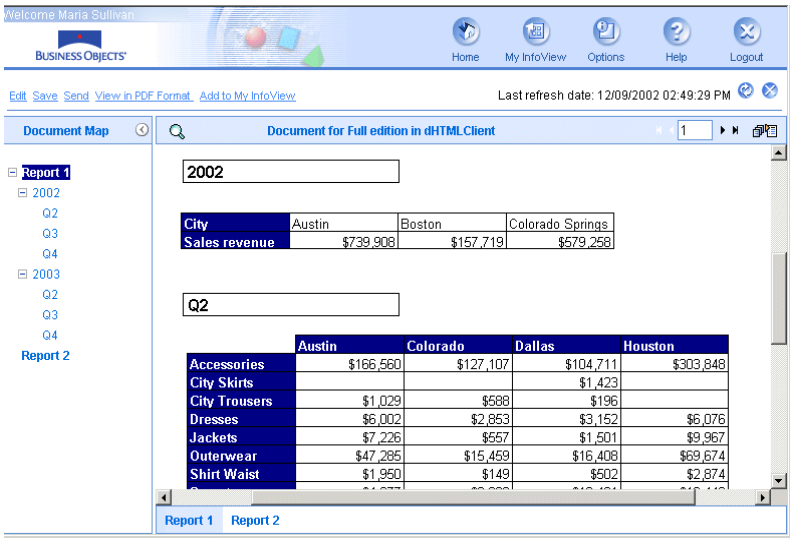
These lists not only keep you up to date with all the documents likely to impact your work, but provide you with the means to view, update and manage those documents. You can save documents for your personal use, send them to other users, and save them to the corporate repository for broader circulation.

What can you do with InfoView?

You can use InfoView as your common entry point for viewing, managing, distributing, and downloading documents in your corporate repository.

InfoView allows you to access documents that have been created using either WebIntelligence or BusinessObjects, and any other documents that are uploaded to the repository, such as Word documents, Excel spreadsheets, and PDF files. For information about how WebIntelligence and BusinessObjects documents are created, refer to "Creating and Editing Documents" on page 113.

The documents you view may be simple ones containing tables or charts, or more complex ones containing hyperlinked indexes, created in WebIntelligence, which allow you to navigate instantly between sections.



Because you are using a web browser, you can also read documents containing hyperlinked images and sound or video objects. For example, by clicking the name of a model in an imported car catalog, a document could launch a video showing a 360° view of the car, as well as its interior features.

Depending on your user rights, you can also install BusinessObjects from your browser to view, create and edit documents.

User rights

The actions you can perform on a particular document or document type depend on your user rights.

If you can see a document area in your interface, such as the Corporate Documents area in the Home page, you have the rights to view these documents. You may also have editing rights.

If you have a question regarding your user rights, ask your system administrator or Business Objects supervisor.

New look InfoView

If your InfoView pages do not look like the images in this guide, your system administrator may have chosen a different skin, or customized the interface for use in your company or organization. For more information, refer to "Selecting your default skin" on page 70.

How are documents created?

WebIntelligence and BusinessObjects users use the same BusinessObjects technology to query a database or data warehouse for the purpose of generating documents.

The two basic mechanisms in this technology are:

- Universes used to build queries.
- Queries used to retrieve information from data storage.

Universes

A universe is the business-intelligent semantic layer that isolates users from the technical aspects of the database.

Universes are made up of objects and classes:

- Objects are elements that map to a set of data from a relational database in terms that pertain to your business situation.

  For example, the objects in a human resources universe might include Names, Addresses and Salaries.
- Classes are logical groupings of objects.

  For example, the objects listed above might belong to a class called Employees.

In your company or organization, universes are created by a universe designer, using BusinessObjects Designer. WebIntelligence and BusinessObjects users then use these universes to access the data they need from the database through an intuitive, user-friendly interface.

Queries

If you have the right to create documents, you can build queries by adding objects from a universe to a document editor and organizing the objects so that the data is clearly displayed. When the users run the query, the data mapped to the objects in the query is retrieved from the database. A document is then generated using the data and formatting defined by the designer.

For information, refer to "Creating and Editing Documents" on page 113.

What is new in InfoView?

If you have used a previous version of InfoView, the table below gives you an overview of the changes made in this release.

What has changed	What it is now
New interface	InfoView has a new streamlined web interface that provides easy navigation and quick access to WebIntelligence, BusinessObjects, and other documents. The redesigned InfoView Home page provides an overview of all the documents to which you have access in the corporate repository and in your personal document storage areas. From the Home page, you can also add documents to InfoView from your own computer, or launch WebIntelligence or BusinessObjects to create new reports.
Personalization using skins	With this release, InfoView comes with a set of skins to let you customize InfoView's look and feel without any programming. Skins are sets of images and styles that alter the interface's colors, fonts, graphics, icons, and toolbars. You can use any of the sample skins provided by Business Objects simply by choosing one in the Options page. A company administrator can go one step further by creating a custom company skin to make InfoView adhere to a company's corporate standards. For more information, refer to "Selecting your default skin" on page 70.
My InfoView personalization using in-line editing	You can now move and delete portlets directly in My InfoView instead of having to go through wizards. It's faster and more straightforward to use. For more information, refer to "Working with portlets" on page 85.

What has changed	What it is now
Streamlined document actions	Working with documents has never been easier. Document exchange has been streamlined into two actions, Save and Send. Send still transmits documents to one or more other InfoView users. Publish, Save and Download have been grouped together as Save, meaning that you now respectively: • Save a document to the Corporate Documents page, a storage area. • Save a document to your Personal Documents page. • Save a document to the file system on your computer, outside of InfoView. This option allows you to save the document in formats such as Microsoft® Excel. For more information, refer to "Saving documents" on page 155.
Interactive report viewing	InfoView now provides for the interactive viewing of WebIntelligence reports. Users with no knowledge of how to build or modify a report can now change the structure and properties of a report without having to use a document editor. When this feature is enabled, you can filter and sort the data in a report. You enable and disable this feature in the InfoView Options page. The availability of this feature depends on how InfoView was installed and what user rights you have. Ask your administrator if you have the rights to this feature.

What has changed	What it is now
Corporate hierarchical categories	In previous versions of InfoView, users could associate documents in the Corporate Documents page with one or more categories. With this version, you can create subcategories within categories, and so, create hierarchical categories. You can then associate a document with one or more of these categories or subcategories. In InfoView, these categories can be displayed either as links at the top of the page, or as a standard, collapsible tree in a navigational panel to the left of the page. To see the documents associated with a given category, simply click the category's name. If you want, you can save documents to one or more categories simultaneously. For more information, refer to "Introducing hierarchical categories" on page 143.

Getting Up and Running

chapter 2

Overview

This chapter explains how to:

- check your browser settings
- log into InfoView
- log out of InfoView
- get help

Checking your browser configuration

For InfoView to run correctly, you need to make sure your browser configuration is adapted to InfoView use.

Before you log into InfoView for the first time you should run an automatic check for any potential configuration problems. To do this, ensure that your browser is:

- enabled for JavaScript
- enabled for cookies
- supported by Business Objects

The following sections explain how to do this.

Is your browser JavaScript-enabled?

If your browser is not JavaScript-enabled, it cannot run the Check Browser feature, and an error message appears. Click Online Help for instructions on where to find a list of supported browsers.

The Browser Check cannot work without JavaScript. You must Java enable your browser before checking your browser settings.

▶ **To enable an Internet Explorer browser for JavaScript:**

1. From the **Tools** menu, select **Internet Options**.
   The Internet Options dialog box appears.
2. Click the **Security** tab.
3. Click **Internet**.
4. Click **Custom Level**.
   The Security Settings dialog box appears.

5. Scroll down to the Microsoft VM - Java permissions heading and select the safety level you want.

   If Java permissions are not available as an option, you must install a more recent version of the browser.
6. Click **OK**.

   A confirmation window appears.
7. Click **Yes**.

   Your browser is now JavaScript-enabled.
8. Click **OK** to save your settings and close the Internet Options dialog box.

Enabling your browser for cookies

To cookies enable a Microsoft Internet Explorer 5.5 browser:

1. On the browser window click **Tools**.

   An Internet Options dialogue box appears.
2. Select the **Security** tab.
3. Click **Custom Level**.

   A security Settings dialog box appears.
4. Scroll down to the section called Cookies.
5. Select one of the following options:

   - Prompt—if you want a message to appear before each time it writes something to your environment.

   - Select Enable—if you do not want to see a message appear each time cookies are about to be downloaded.
6. Go back to the Browser Check page and run the browser check again.

Checking your browser configuration

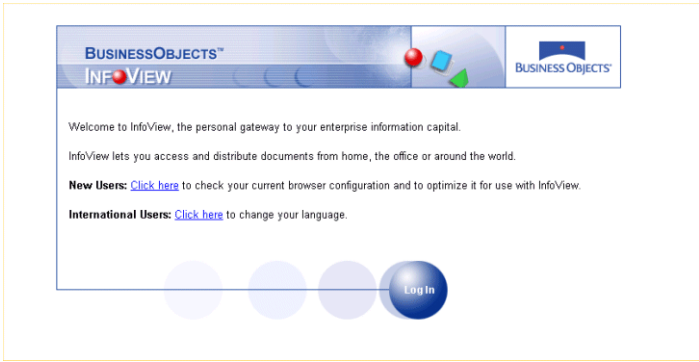
The Browser Check option verifies whether your browser is correctly configured for InfoView. It does not indicate whether or not the browser you are using is one that is supported by Business Objects.

You must compare your configuration with the list of supported browsers that we provide.

To check your browser settings:

1. Start your Internet browser.
2. Point your browser to InfoView using either the bookmark or the URL your InfoView system administrator has given you.

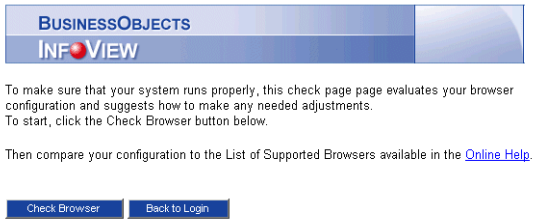
   The InfoView login page appears.


BUSINESSOBJECTS™
INFOVIEW
BUSINESS OBJECTS
Welcome to InfoView, the personal gateway to your enterprise information capital.
InfoView lets you access and distribute documents from home, the office or around the world.
New Users: Click here to check your current browser configuration and to optimize it for use with InfoView.
International Users: Click here to change your language.
Log In

   If your login page does not look like this, your system administrator may have customized it for use in your company or organization.

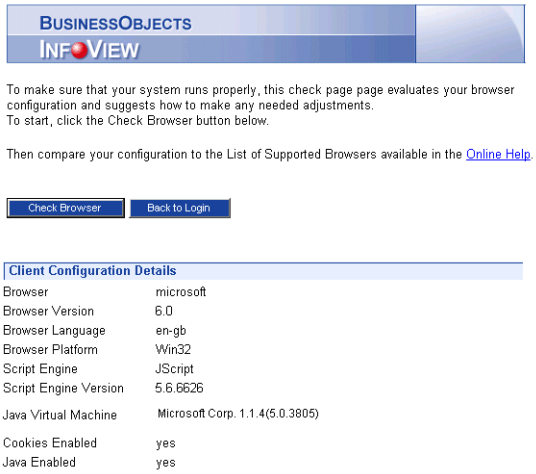
3. Click **Click here** to check your browser's configuration.

   The Browser Check page opens.


BUSINESSOBJECTS
INFOVIEW
To make sure that your system runs properly, this check page page evaluates your browser configuration and suggests how to make any needed adjustments.
To start, click the Check Browser button below.
Then compare your configuration to the List of Supported Browsers available in the Online Help.
Check Browser
Back to Login

4. Click **Check Browser**.

   After a few seconds, InfoView displays information about the browser you are currently using in the Client Configuration Details section of the page.


BUSINESSOBJECTS
INFOVIEW
To make sure that your system runs properly, this check page page evaluates your browser configuration and suggests how to make any needed adjustments.
To start, click the Check Browser button below.
Then compare your configuration to the List of Supported Browsers available in the Online Help.
Check Browser
Back to Login
Client Configuration Details
Browser microsoft
Browser Version 6.0
Browser Language en-gb
Browser Platform Win32
Script Engine JScript
Script Engine Version 5.6.6626
Java Virtual Machine Microsoft Corp. 1.1.4(5.0.3805)
Cookies Enabled yes
Java Enabled yes

   However, you are not told if this browser is supported. For information on supported browsers, refer to the Online Help.

5. Click **Back to Login** to return to the InfoView login page.

Logging into InfoView

To log into InfoView, you need the following from your InfoView system administrator:

- Your user name and password

  If you are already a BusinessObjects user, you can use your BusinessObjects user ID and password to log into InfoView
- The URL or a bookmark which allows you to access InfoView

NOTE

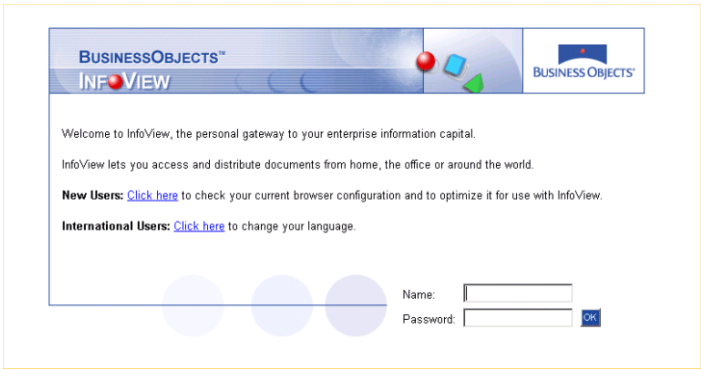
Depending on how your system administrator has set up your account, the pages giving you access to InfoView may not resemble the pages displayed below. You may not even be prompted for a user name and password. If you need help launching InfoView, contact your system administrator.

To log in:

1. Start your Internet browser.
2. Point your browser to InfoView using either the bookmark or the URL your system administrator has given you.

   The InfoView login page opens.
3. Click **Log In**.

   The Name and Password fields appear.


BUSINESSOBJECTS™
INFOVIEW
BUSINESS OBJECTS
Welcome to InfoView, the personal gateway to your enterprise information capital.
InfoView lets you access and distribute documents from home, the office or around the world.
New Users: Click here to check your current browser configuration and to optimize it for use with InfoView.
International Users: Click here to change your language.
Name:
Password:
OK

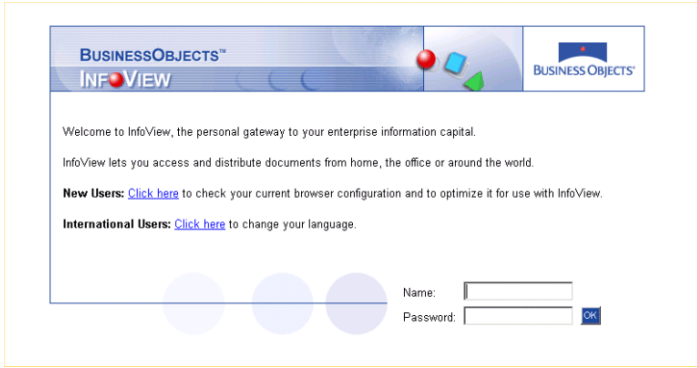
4. Enter your user name and password.
5. Click **OK**.
   Your InfoView start page appears and you can begin working in InfoView.

NOTE

To work in multiple windows at the same time, log into InfoView again in a separate browser window.

Using the multilingual feature

InfoView now lets you log into InfoView using your preferred language of choice. International users wishing to use a language other than the default language (browser or cluster locale) may now do so at the login level.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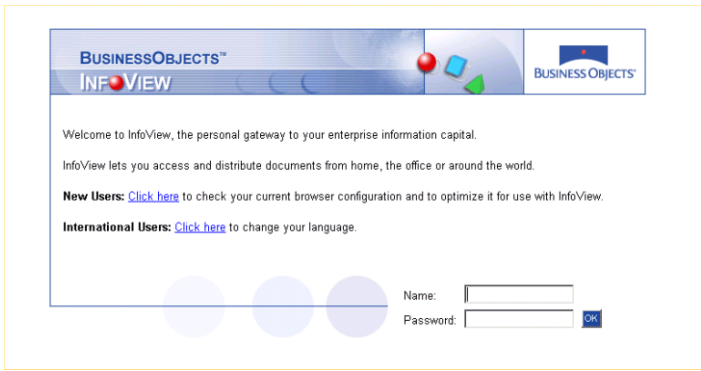
Welcome to InfoView, the personal gateway to your enterprise information capital.
InfoView lets you access and distribute documents from home, the office or around the world.
New Users: Click here to check your current browser configuration and to optimize it for use with InfoView.
International Users: Click here to change your language.
Name:
Password:
OK

To log in to InfoView using your language of choice:

1. Start your Internet browser.
2. Point your browser to InfoView using either the bookmark or the URL your system administrator has given you.
   The InfoView login page opens.

3. In the International Users section, click the link.
   The following page appears.


BUSINESSOBJECTS
INFOVIEW
BUSINESS OBJECTS
Welcome to InfoView, the personal gateway to your enterprise information capital.
InfoView lets you access and distribute documents from home, the office or around the world.
New Users: Click here to check your current browser configuration and to optimize it for use with InfoView.
International Users: Click here to change your language.
Name:
Password:
OK

4. Select the language from the list and click on it.
5. InfoView automatically returns to the login page displayed in the desired language.

Only languages that are currently supported localized languages and are installed are available. To return to the original user locale language, select Automatic from the list of languages.

NOTE

The user preferred language can still be set in the Options page. For more information on this feature, please see The Options page on page 42.

Logging out of InfoView

You log out of InfoView by clicking the Logout button in the InfoView toolbar.

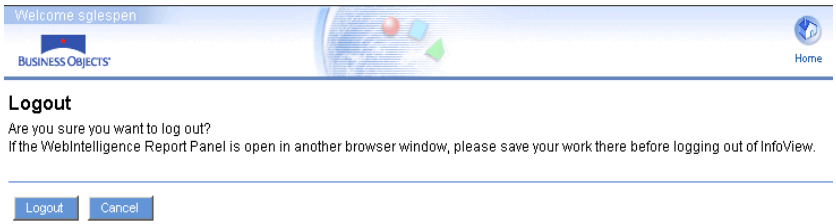
If you leave InfoView inactive longer than the maximum time period defined by your system administrator, your session is closed automatically, and you must log in again.

NOTE

When you have finished using InfoView, log out of the product instead of just closing your browser. This enables you to save any settings you may have changed, and it helps InfoView system administrators keep track of which users are logged into the system and active at any given time. This allows them to configure the system to handle transaction loads more efficiently.

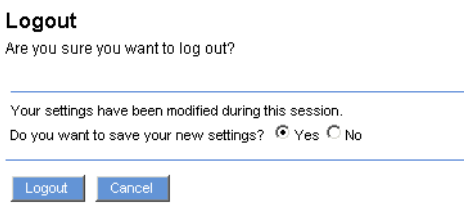
To log out:

1. Click the **Logout** button in the InfoView toolbar.
   A confirmation window appears.


Welcome sglespen
BUSINESS OBJECTS
Home
Logout
Are you sure you want to log out?
If the WebIntelligence Report Panel is open in another browser window, please save your work there before logging out of InfoView.
Logout
Cancel

2. Click **Logout**.

   If you have made any changes to your user options, and have not saved them, a *Keep my settings* option appears.


Logout
Are you sure you want to log out?
Your settings have been modified during this session.
Do you want to save your new settings? Yes No
Logout
Cancel

3. By default, your settings are retained. To revert to your previous settings, select **No**.
4. Click **Logout**.

   The Login page appears. You have logged out.

   If you decide not to log out, click **Cancel**. You are returned to the last page you visited, but any changes you made to your settings are not saved.

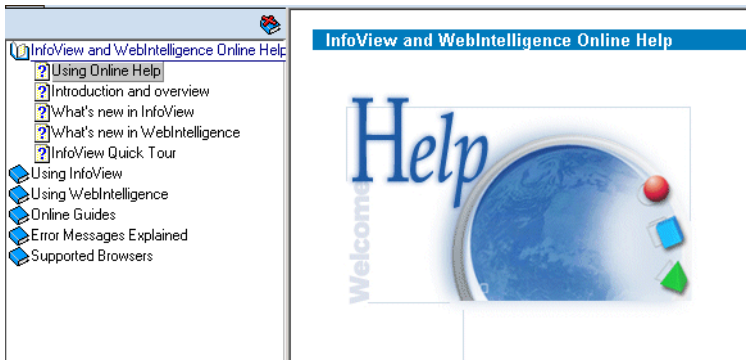
Getting help

The context-sensitive InfoView online help provides you with a detailed description of both InfoView and the concepts behind it, as well as complete instructions for using the product, every step of the way.

To access the InfoView and WebIntelligence online help:

- From the InfoView Login page, click the Online Help link.
- From the Home page, click the Online Help link.
- From anywhere within the product, click the Help icon on the InfoView toolbar. The InfoView and WebIntelligence Online Help page is displayed.

The InfoView Help window has two frames, making navigation easy no matter where you are.



The navigation frame is resizable, and consists of:

- an expandable and collapsible table of contents
- a multi-level index with keyword search functionality
- a search facility

When you launch the help, it displays the content of individual help topics that relate to the actions you are performing. Where relevant, it also contains links to related help topics, to online guides in PDF format, or to multimedia demonstrations.

InfoView Page Layout

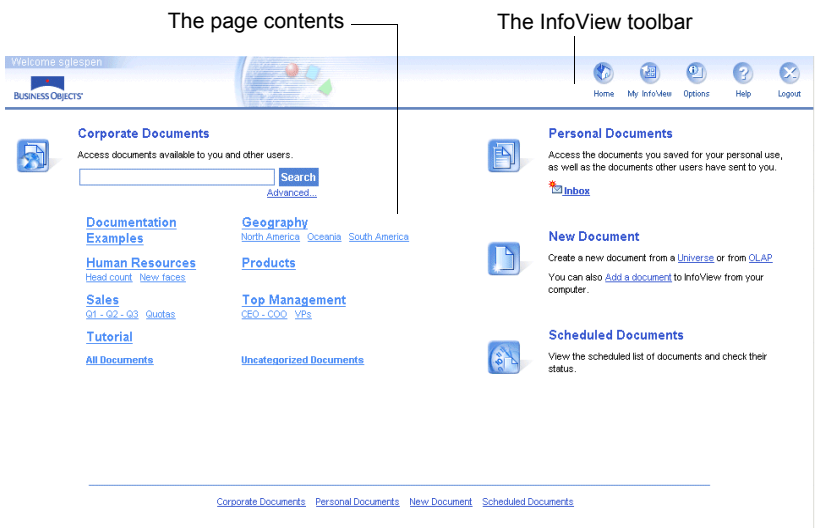
chapter 3

Overview

This chapter provides an introduction to the new InfoView page layout. It gives a brief description of each area of InfoView, with links to other chapters where the features are explained in more detail and instructions given on how to use them.

InfoView pages have two parts:

- The InfoView toolbar with links to other pages and the online help.
- The page contents with links to document lists, and the navigation bar with links to the other principle pages in InfoView:

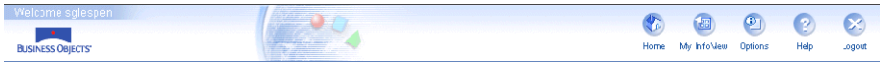


The InfoView toolbar

The InfoView toolbar appears throughout the product. It does not change as you navigate through different pages.

It includes links to the following pages:

- Home
- My InfoView
- Options
- Help
- Logout



The rest of this chapter provides a brief introduction to each of these pages, and explains where you can find more information.

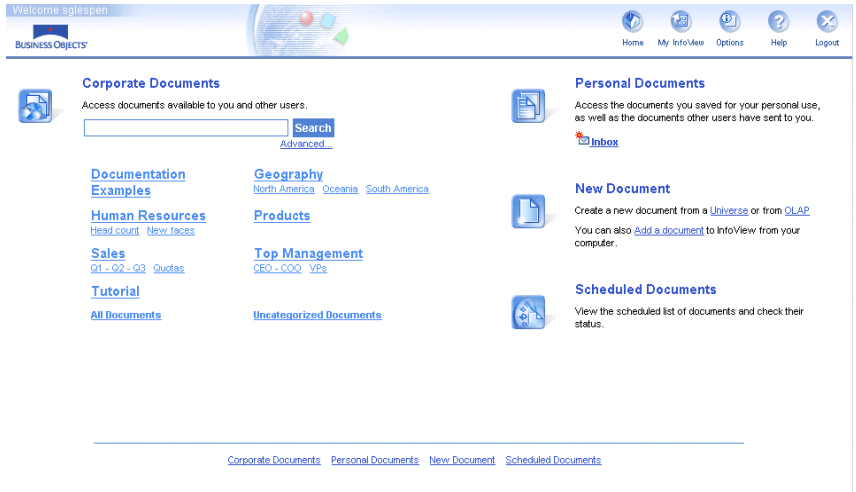
The Home page

The Home page is the main page of InfoView. It gives you direct access, depending on your rights, to:

- Corporate Documents
- Personal Documents
- New Documents
- Scheduled Documents

Unless your system administrator has created a default page, the Home page is the first page to open when you log into InfoView. The Home page is your base for viewing, managing, and distributing the documents in your corporate database, including WebIntelligence and BusinessObjects documents.

An example Home page is shown below:

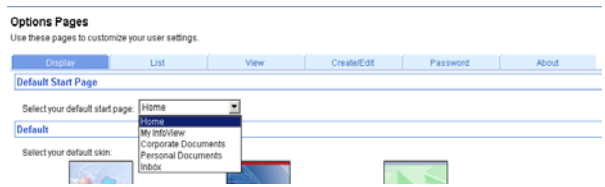


REMINDER

You only see the document areas you have rights to access and manage.

If you have a question regarding your user rights, ask your system administrator.

You can define a different start page by simply selecting the default page you want from the list in the Options page:



For more information, refer to Selecting your default start page on page 69.

My InfoView

My InfoView can display data from a variety of sources in a single web page. You can set up InfoView to display the information most important to you by adding *portlets*. A portlet is a part of a browser page; each one can display different content. In this way, you can view information from different sources at the same time in your browser window.

You can add as many portlets as you like to My InfoView.

The image below shows My InfoView set up with four portlets, with the left column as medium size.

Welcome to My InfoView
Welcome To My InfoView
Register yourself for the chance to win a gift. Registered users are the first in line to receive information on Business Objects product developments, training courses, and user conferences direct in their mailbox. You can register now on our web site.
My InfoView displays data from a variety of sources in a single web page. You can set up My InfoView to instantly show you the information you need by dividing the browser window into different portlets. You can display different portlets at once, each displaying different information. You can also move or delete the portlets.
Need help getting started? Go to the Online User Help from here. It describes InfoView and WebIntelligence features and interfaces. It also provides complete instructions for all the InfoView tasks you can perform.
BusObj
BUSINESS OBJECTS
>> Contact Us | Publications | Site Map | Support
my profile
| Company | Products | Solutions | Services | Customers | Partners | Investors | News | Events | Store
The Standard in Business Intelligence
is Now Crystal Clear.

The default My InfoView page welcomes you to the product and gives you a quick introduction to InfoView.

It also contains links to the online help, where you are introduced to the basic concepts of InfoView:

Welcome to My InfoView
Welcome To My InfoView
Register yourself for the chance to win a gift. Registered users are the first in line to receive information on Business Objects product developments, training courses, and user conferences direct in their mailbox. You can register now on our web site.
My InfoView displays data from a variety of sources in a single web page. You can set up My InfoView to instantly show you the information you need by dividing the browser window into different portlets. You can display different portlets at once, each displaying different information. You can also move or delete the portlets.
Need help getting started? Go to the Online User Help from here. It describes InfoView and WebIntelligence features and interfaces. It also provides complete instructions for all the InfoView tasks you can perform.

For more information about My InfoView and how to customize it, refer to Adding documents to My InfoView on page 92.

The Options page

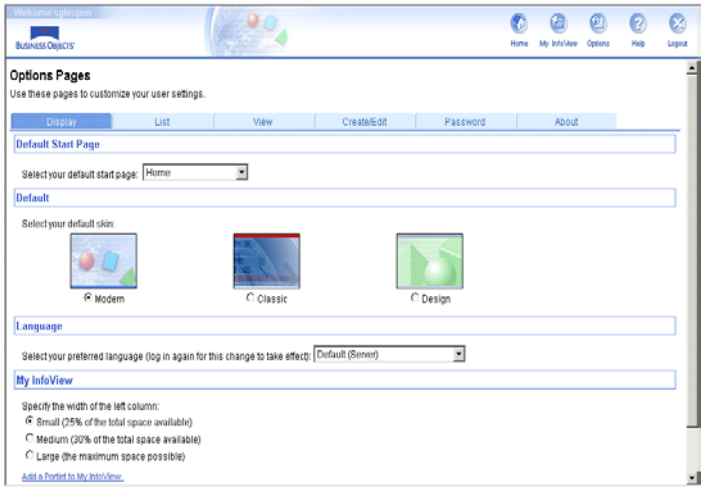
The Options page is where you define all your InfoView settings. The available tabs are:

- Display
- List
- View
- Create/Edit
- Password
- About

Display

The Display tab options enable you to:

- Select your default start page.
- Select the default skin you want to use.
- Select the language you want to use.
- Specify the width of the left column in My InfoView.
- Add a portlet to My InfoView.

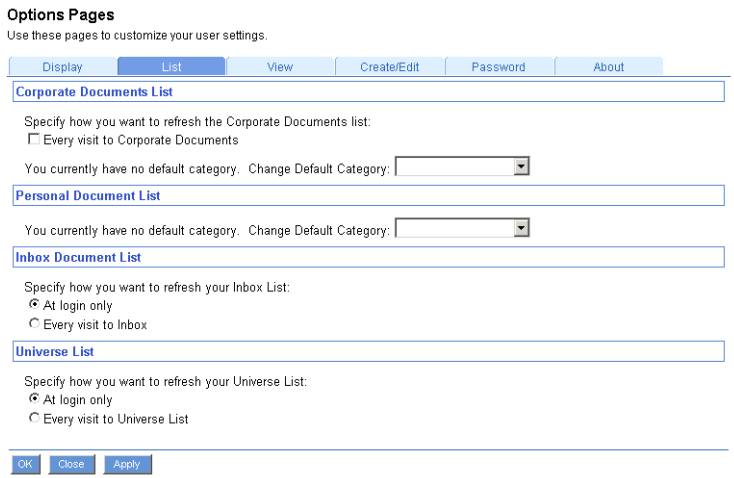


For more information, refer to Customizing InfoView on page 67.

List

The List tab options enable you to:

- Specify how you want to refresh your document lists.
- Choose a default category for your Corporate Documents and Personal Documents lists.

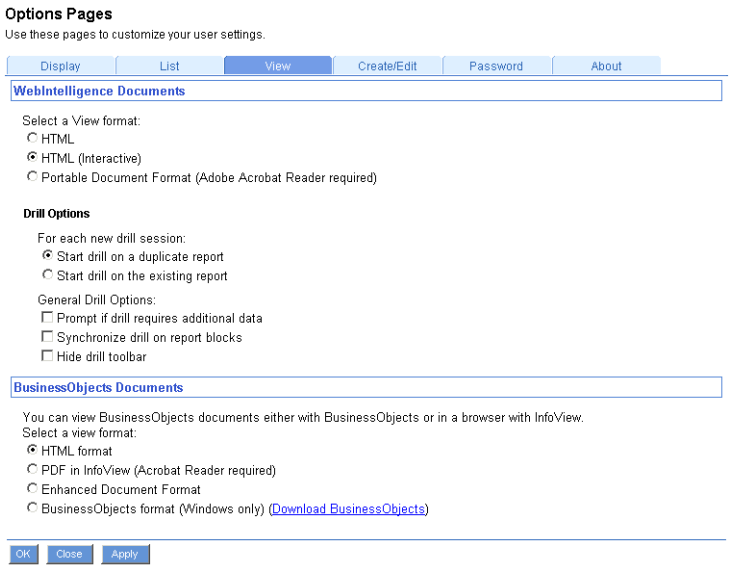


For more information, refer to Refreshing documents on page 108.

View

The View tab options enable you to select the format in which you want to view your WebIntelligence and BusinessObjects documents:

- For WebIntelligence, you can also choose your drill options.
- For BusinessObjects, you can also choose to download BusinessObjects if it is not already installed on your local machine.

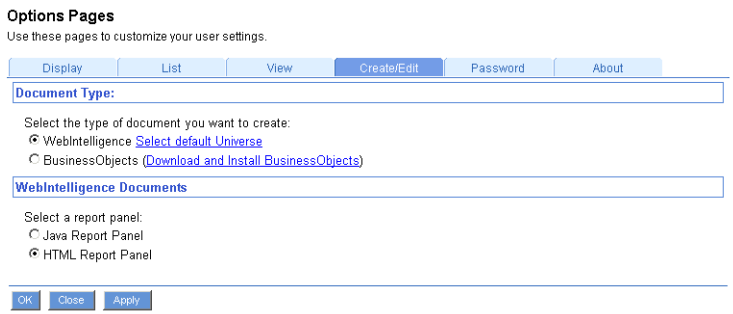


For more information, refer to Viewing and Refreshing Documents on page 95.

Create/Edit

The Create/Edit tab options are displayed if you have the rights to create and edit documents. This tab enables you to:

- Select the default type of document you want to create.
- Select the report panel to use to create and edit your WebIntelligence documents.



For more information, refer to Creating and Editing Documents on page 113.

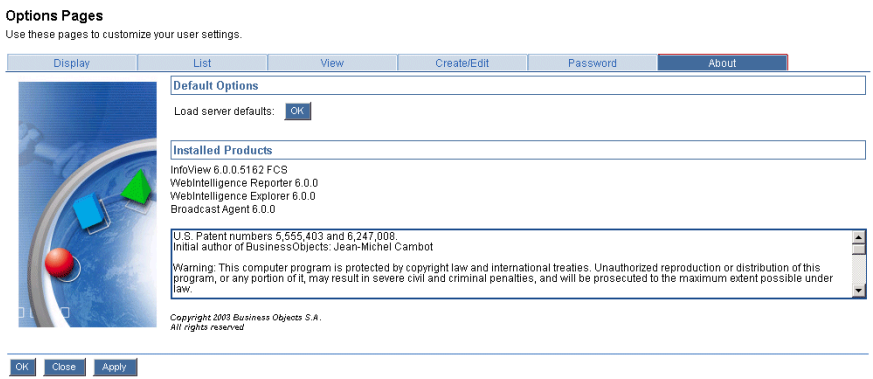
Password

The Password tab is displayed if you have the rights to change your password.

For more information, refer to Changing your password on page 82.

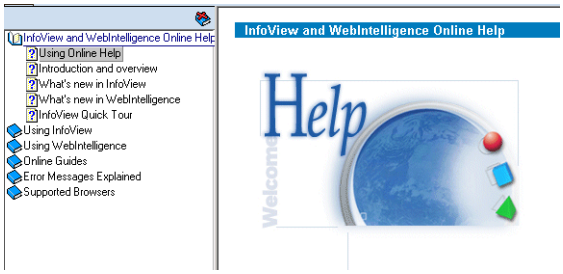
About

The About tab shows you the products you have installed, and their version numbers.


Options Pages
Use these pages to customize your user settings.
Display
List
View
Create/Edit
Password
About
Default Options
Load server defaults:
OK
Installed Products
InfoView 6.0.0.5162 FCS
WebIntelligence Reporter 6.0.0
WebIntelligence Explorer 6.0.0
Broadcast Agent 6.0.0
U.S. Patent numbers 5,555,403 and 6,247,008.
Initial author of BusinessObjects: Jean-Michel Cambot
Warning: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
Copyright 2003 Business Objects S.A.
All rights reserved
OK
Close
Apply

The Help pages

From anywhere within InfoView, click the Help icon on the InfoView toolbar and the context-sensitive InfoView and WebIntelligence Online Help page is displayed.



For more information, refer to Getting help on page 36.

The Logout icon

You can also log out of InfoView anytime you like by clicking the Logout icon in the InfoView toolbar.

For more information, refer to Logging out of InfoView on page 34.

The page contents

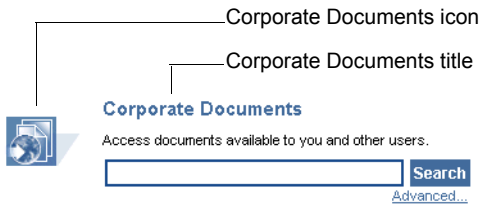
The page contents occupy the largest frame in the browser window. The contents change as you navigate from page to page.

The Home page is the main page of your portal and gives you direct access to the main areas of InfoView. The following section describes the contents of the Home page.

Corporate Documents

The Corporate Documents page is a catalog of all the documents to which you are allowed access in the corporate repository, the centralized BusinessObjects storage and distribution mechanism that manages universes, user information, and document exchange. As long as you have the right to view a single corporate document, InfoView contains a Corporate Documents page.

To access the Corporate Documents page, click either the Corporate Documents title or its icon.



For more information, refer to Accessing documents on page 59 and Document types on page 125.

Search

InfoView manages a large number of documents. To make it easy to find the document you need, you can search for documents by name.

For more information, refer to Searching for documents on page 63.

Advanced Search

The advanced search allows you to search using the document name, sender/publisher name, keywords, date of last modification, and document location (Corporate Documents, Personal Documents and your Inbox).

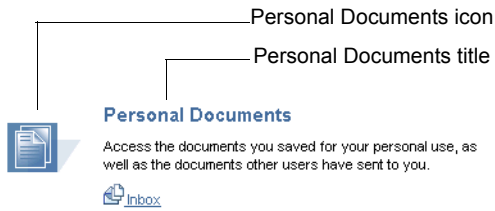
You can even combine two or more of these search criteria to fine-tune your search and return a more accurate set of search results.

For more information, refer to Searching for documents on page 63.

▶ Personal Documents

The Personal Documents page lists the documents you have saved for your own personal use.

To access the Personal Documents page, from the Home page, click either the Personal Documents title or its icon:


Personal Documents icon
Personal Documents title
Personal Documents
Access the documents you saved for your personal use, as well as the documents other users have sent to you.
Inbox

For more information, refer to Accessing documents on page 59 and Document types on page 125.

▶ Inbox

The Inbox page contains the documents that other users have sent you. Unread documents are marked with a closed envelope. Click the envelope or the document name to open the document.

For more information, refer to Document types on page 125.

New Document

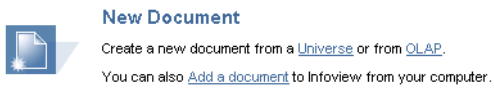
The New Document option enables you to:

- create documents directly from a universe—for BusinessObjects and WebIntelligence documents, or from an OLAP data source—for WebIntelligence OLAP documents.

  For more information, refer to Creating and Editing Documents on page 113.
- Add documents other than WebIntelligence or BusinessObjects documents to your portal from your computer.

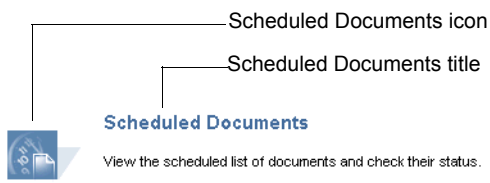
  For more information, refer to Adding a document to InfoView on page 127.

To access these options, click the appropriate link in the New Documents section:


New Document
Create a new document from a Universe or from OLAP.
You can also Add a document to Infoview from your computer.

Scheduled Documents

From the Scheduled Documents option, you can view the list of documents that you have scheduled in Broadcast Agent, and check their status.
To access this list, click either the Scheduled Documents title or its icon:


Scheduled Documents icon
Scheduled Documents title
Scheduled Documents
View the scheduled list of documents and check their status.

For more information, refer to Scheduling documents on page 167.

Navigation bar

The navigation bar at the bottom of the page allows quick and easy access to the different areas of the Home page while you are navigating in InfoView:

The navigation bar is available:

- in the Home Page
- when viewing document lists
- in the Corporate Documents and Personal Documents pages
- in data source lists
- in the Scheduled Documents page

The navigation bar is not available:

- when using the Document Viewer
- in My InfoView
- when saving documents
- when sending documents
- in the Options pages
- when using the search page
- when adding documents
- when logging out

NOTE

If the page contains too much data, you may need to scroll down to see the navigation bar.

Getting to the Documents You Need

chapter 4

Overview

This chapter explains how you can quickly navigate in InfoView to find the documents you need to work with. It explains how to access other parts of InfoView from the Home page, describes the different InfoView document types, and introduces the concept of *categories*.

By default, the Home page is the first page that opens when you open InfoView. However, you can change your default page to one of your choice, as explained in Chapter 5 Customizing InfoView.

The Home page gives you direct access to the main areas of the InfoView portal. It provides links to the different document lists. These are:

- Corporate Documents

  Takes you to a list of documents in the Corporate Documents page.
- Personal Documents

  Takes you to a list of documents in your Personal Documents page.
- New Documents

  Lets you create documents.
- Scheduled Documents

  Shows documents that have been sent to Broadcast Agent.

To access one of these lists, click either the icon and title of the list you want.

Navigating in InfoView

You can access existing documents from document lists in the Corporate Documents page and Personal Documents page. You can access your inbox documents from the Personal Documents page. The documents in your inbox are the documents that other users have sent you.

All users have the rights to access their own Personal, Corporate and Inbox Document pages; this depends on whether you have been granted the rights by your system administrator.

Document lists can include WebIntelligence and BusinessObjects documents, as well as any other documents that have been saved to the system. You can recognize each type of document by the icon preceding the document in the list.

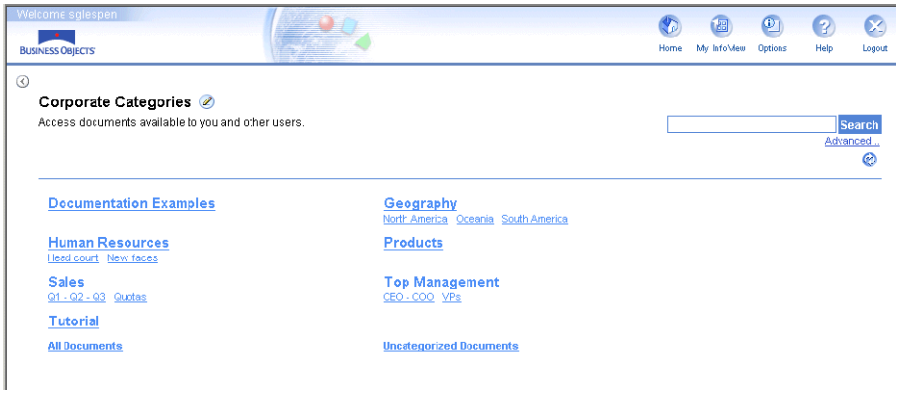
You can sort the order in which document lists are displayed. To find out how to do this, refer to Managing Documents on page 123.

Document lists display the following information:

- the document name and type
- the name of the document sender/publisher (for corporate documents)
- the date the document was last updated
- the file size

The Corporate Documents page

The Corporate Documents link takes you to the list of documents you are allowed to access in the corporate repository.



All categories are shown, as well as:

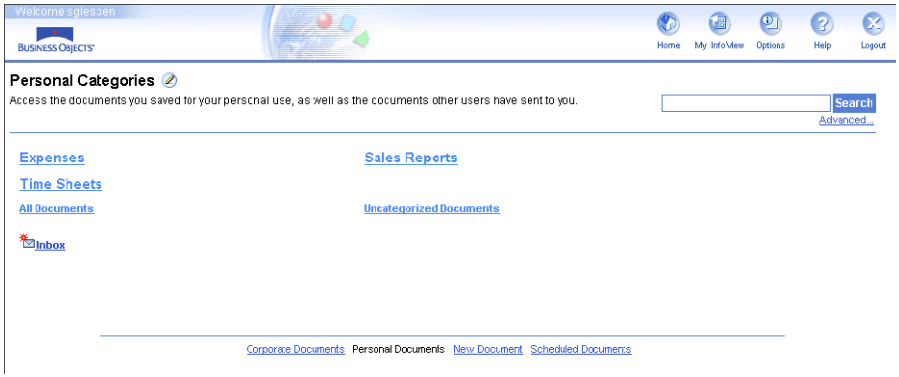
- a link to a list of all documents in the corporate repository, regardless of the categories to which they have been assigned
- a link to the list of documents that have not been categorized

If you have the rights you can rename, add, edit and delete documents in this category list. For more information, refer to The Corporate Documents page on page 56.

You can search for documents in your Corporate Documents area. Refer to Searching for documents on page 63 for more information.

Your Personal Documents page

The Personal Documents link takes you to the lists of documents you have saved for your personal use.



These can be documents you have created, corporate documents of which you have saved a personal copy, or documents sent to you by other users that you have saved.

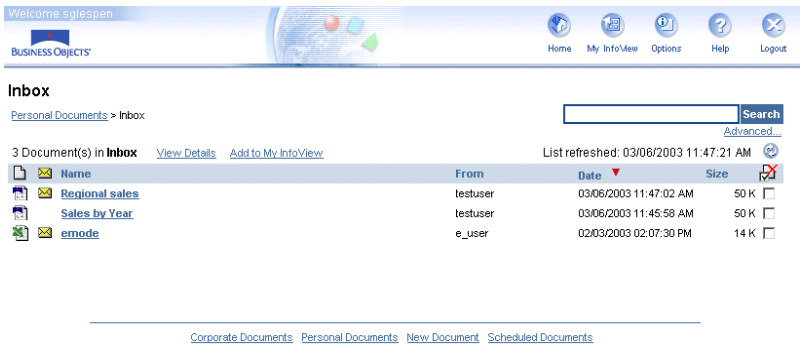
As with the Corporate Documents page, this page displays all the categories you have created, and a link to the list of documents that you have not categorized.

From here you can view:

- individual categories that you have created
- all the documents in your personal document list, regardless of the categories to which you have assigned them
- the documents in your inbox

Inbox documents

To access the list of documents in your inbox, click the Inbox link.



Unread documents are indicated by a closed envelope. To open a document, click the document name.

Accessing documents

This section describes how you access documents from:

- the Corporate Documents page
- your Personal Documents page
- your inbox

For information on viewing scheduled documents, refer to Scheduling documents on page 167.

Accessing documents from the Corporate Documents page

Corporate documents are stored in InfoView and are accessible to groups of users across your enterprise.

NOTE

Before you select a document, check that your viewing options are set to the format you want. For more information, refer to Specifying your document viewing format on page 76.

To open a document from Corporate Documents:

1. From the Home page, click **Corporate Documents**.
   The InfoView Corporate Documents page appears.
2. The next step depends on whether you want to select a document from the list of documents in Corporate Documents, or whether you want to search for the document using a particular word:

If you want to...	then...
select a document from the list of documents in Corporate Documents,	click the name of the category in which the document is stored, or **All Documents**.
search for a document in Corporate Documents,	type the name of the document, or part of the name, in the Search box, then click **Search**. For information about advanced search options, refer to Searching for documents on page 63.

If you clicked a category name, the documents in that category are listed.

For each document, the list displays:

- the document title
- the name of the document's sender/publisher
- the date on which the document was created
- the document size

3. Click the title of the document you want to view.

   The document either opens directly or, if the document contains prompts, you are prompted to enter values before you can view the contents.

   For information on prompts and information on filling in prompt values, refer to Prompts on page 110.

Accessing documents from your Personal Documents page

Your Personal Documents page is your personal storage space in InfoView. Only you can access documents stored here. You can access documents in two places on your Personal Documents page:

- Personal Documents—your personal file storage space.
- Inbox—the documents other users have sent you.

The following section tells you how to access both.

▶ Opening a document in your Personal Documents page

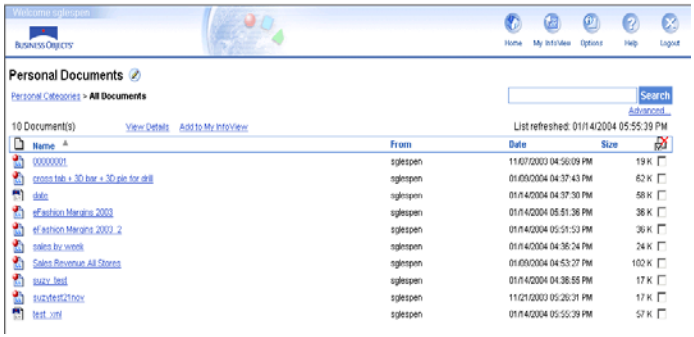
To open a document in your Personal Documents page:

1. From the Home page, click **Personal Documents**.

   Your InfoView Personal Documents page appears.

2. Click the name of the category in which the document is stored, or **All Documents**.

   Your personal documents are listed.



3. Click the title of the document you want to view.

   The document either opens directly or, if the document contains prompts, you are prompted to enter values before you can view the contents.

   For information about filling in prompt values before displaying documents, refer to Viewing documents with prompts on page 110.

Accessing new documents in your inbox

To access the documents other users have sent you:

1. From the Home page, click **Personal Documents**.

   Your InfoView Personal Documents page appears. If you have documents waiting in your Inbox, the Inbox link changes to an open envelope with a yellow arrow as shown here on the left.
2. Click the Inbox link:

If...	then the link looks like this...
you have no new mail waiting,	
you have new mail waiting,	

   The list of documents in your Inbox appears.

NOTE

The envelope does not change to indicate that you have received a new document in your Inbox while you are logged in. To see any documents that you receive while you are logged in, you must refresh the Inbox list.

InfoView does not automatically delete inbox documents once you have read them. To prevent this page from becoming difficult to manage, save documents you have read to your Personal Documents page, and delete the documents that you do not need.

TIP

You can also access your inbox direct from the InfoView Home page by clicking the Inbox link in the Personal Documents area of the page.

Searching for documents

InfoView manages a large number of documents. To make it easy to find the information you need, you can search for documents in two ways:

- based on a document's name
- using advanced search criteria, such as sender/publisher name, keywords, and date of last modification

You cannot search more than one storage area at a time. That is, you cannot search through the corporate documents in the repository and your personal documents stored on the InfoView server at the same time.

Name-based search

If you know at least part of the document's name, you can use the Search feature. This feature allows you to search for document names.

To use the search:

1. Select the area in which you want to search; Corporate Documents, Personal Documents, or Inbox.
2. The search option is displayed.

3. Type the name, or part of the name of the document you want to search for.
4. Click **Search**.

   InfoView returns a list of documents whose names contains the text you searched for.

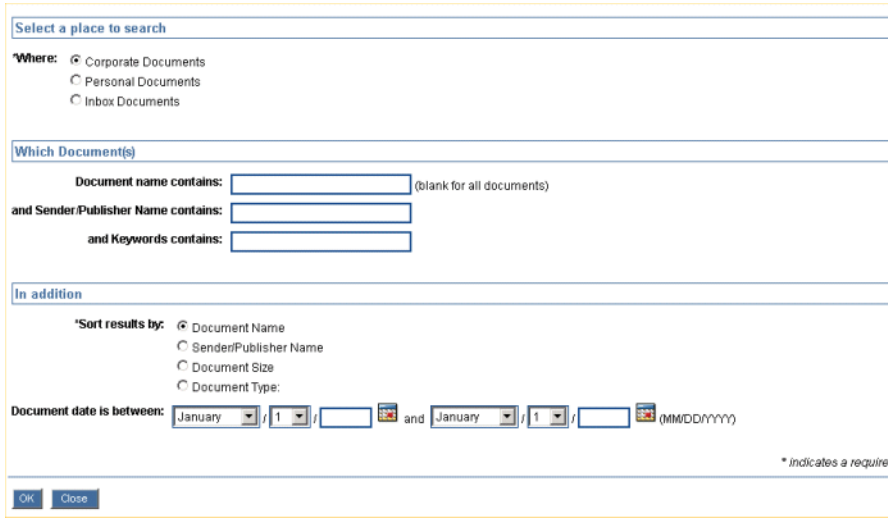
Advanced search based on multiple criteria

The advanced search allows you to search using the document name, sender/publisher name, keywords, date of last modification, and document location.

To use the advanced search:

1. Select the area in which you want to search; Corporate Documents, Personal Documents, or Inbox.
2. Click the **Advanced** link under the Search box.

   The Search Documents page appears.



3. Select the area in which you want to search: Corporate Documents, Personal Documents, or Inbox Documents.

4. Enter values for one or all of the fields, as described in the table below.

Field name	Description
Document name contains	When searching, you do not need to enter the entire document name. For example, if you want to search for a document entitled "Revenue by quarter and sales district," just enter the word "Revenue". However, if you use too common a word, the search may take a long time, or return too many document names to be useful.
Sender/Publisher Name contains	Enter some or all of the name you want to search for. You can launch a search either by entering the entire name, or a partial name.
Keywords contains	Enter keywords that may be associated with the document that you are looking for. Select how you want the results shown or sorted. This can be by document name, sender/publisher name, size, or type.

5. Indicate how you want to sort results.
6. If you want, you can also specify a range of dates for the search. These dates relate to the last time the document was last modified. If you enter start and end dates in the boxes (Month/Day/ Year), only documents that were last modified on or between the dates you specify are returned as a result of the search.

NOTE

A pop-up calendar is now available to make date selection easier. However, when viewing a WebIntelligence report, if you choose a list of values with a date object, a traditional down-down box appears. The pop-up calendar appears if you uncheck this option.

7. Click **OK**.

Once InfoView returns a list of matching documents, you can view any of them by clicking the document's name in the list.

Tips for using the advanced search

- The keywords field in BusinessObjects documents is treated as one field, which means that order in which the words are entered in this field, and any punctuation you include in your search, affect your search results. However, Business Objects recommends searching for one key word at a time.
- The creation, first publication, and first saved dates are not taken into account in this search. The only date that is matched is the date on which the document was last saved to the selected storage area.

Customizing InfoView

chapter 5

Overview

This chapter explains how to customize InfoView so that it is tailored to meet your needs. You do this via the Options pages.

The options are divided into six tabs:

- Display
- List
- View
- Create/Edit
- Password
- About

These tabs contain the settings that allow you define what InfoView looks like, what type of documents you create, and how you view documents. The options available to you depend on the rights that your system administrator gives you.

You do not have to set your options each time you log into InfoView. Your settings apply until you change them again.

NOTE

For every change in the Options pages, you can choose to:

- Click **Apply** to confirm your choice and stay on the Options pages to make more changes.
- Click **OK** to save your changes and exit the Options pages.
- Click **Close** to exit the Options pages and cancel your changes, as long as you have not already clicked **Apply**.

Changing the appearance of InfoView

The Display tab lets you:

- select your default start page
- select your default skin
- specify the width of the left column of My InfoView
- add a portlet to My InfoView

  For more information, refer to Customizing My InfoView on page 83.

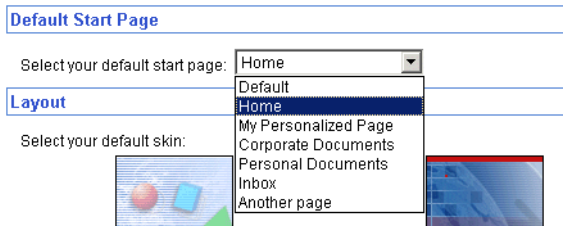
Selecting your default start page

You can set any of the following pages as your default start page:

- Home
- My InfoView
- Corporate Documents
- Personal Documents
- Inbox Documents

To select your default start page:

1. Click the Options icon on the InfoView toolbar.
   The Options page appears.
2. Click the **Display** tab.
   The Display tab appears.
3. Select your default start page from the options:



4. Click **Apply**.

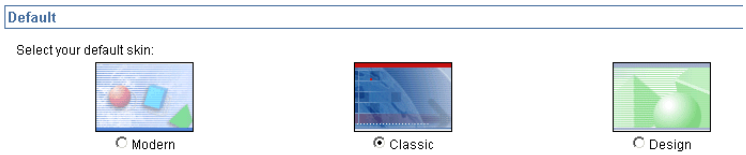
Selecting your default skin

InfoView comes with a set of skins that enable you to change the look and feel of your portal without any programming. Skins are sets of images and styles that alter the interface's colors, fonts, graphics, icons, and the toolbars that determine the interface's functionality.

Your company administrator can also create a custom company skin to make InfoView appear to be designed specifically for your company. For more information, refer to the *Customizing Enterprise 6 without Programming* guide.

To select the skin for your default start page:

1. Click the Options icon on the InfoView toolbar.
   The Options page appears.
2. Click the **Display** tab.
   The Display tab appears.
3. Select the skin you want from the list of options:



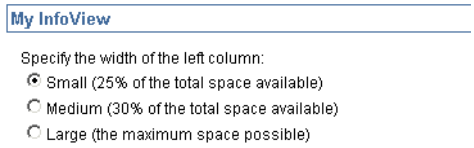
4. Click **Apply** to confirm your choice and stay on the Options page to make more changes.

Resizing the left pane of My InfoView

You can specify the width of the left pane in My InfoView.

To do this:

1. Click the Options icon on the InfoView toolbar.
   The Options page appears.
2. Click the **Display** tab.
   The Display tab appears.
3. Select the width of the pane you want from the list of options:


My InfoView
Specify the width of the left column:
Small (25% of the total space available)
Medium (30% of the total space available)
Large (the maximum space possible)

4. Click **Apply**.
5. For more information about how this changes the look of InfoView, refer to Working with portlets on page 85.

Specifying your document list settings

The List tab lets you:

- set the default category for the Corporate Documents and Personal Documents list
- specify how you want to refresh the Corporate Documents page, your Universe list, and your Inbox

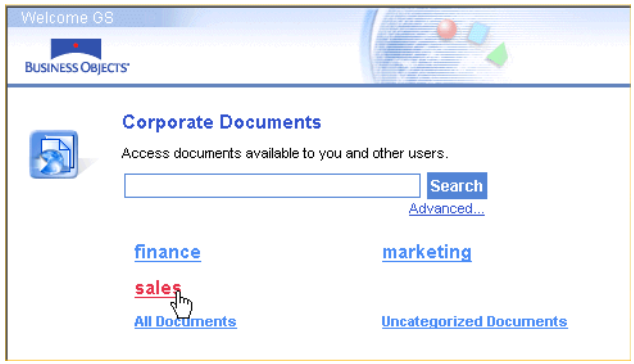
For information about refreshing individual documents, refer to Refreshing documents on page 108.

Setting default categories

You can specify default categories for both the Corporate Documents page and your Personal Documents page. If you do so, the category you choose is displayed instead of the list of all of the categories in the storage area.

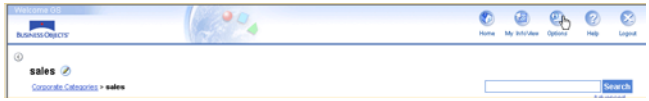
To specify a default category:

1. From your Home page, under Corporate Documents, click the category that you want to make your default category, for example, sales.



   The page containing that category opens.

2. With that page open, click the Options icon in the InfoView toolbar.



   The Options page appears.

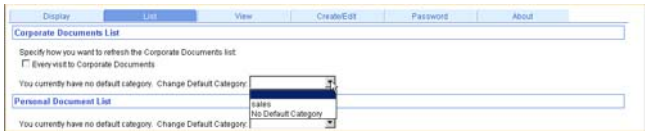
3. Click the **List** tab.

   The List tab appears.

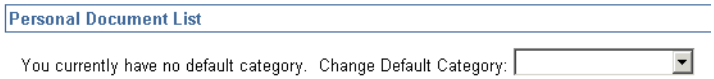
4. To specify a default category for the Corporate Documents page, select the

category you want from the Change Default Category drop-down list in the Corporate Documents List section. You can select one of the following:

- No Default Category
- The category corresponding to the open page, in this case, sales.



5. To specify a default category for your Personal Documents page, select the category you want from the Change Default Category drop-down list in the Corporate Documents List section.



6. Click **Apply**.

Specifying document list refresh options

Each document list displays the last time it was refreshed.

List refreshed: 03/07/2003 01:00:04 PM

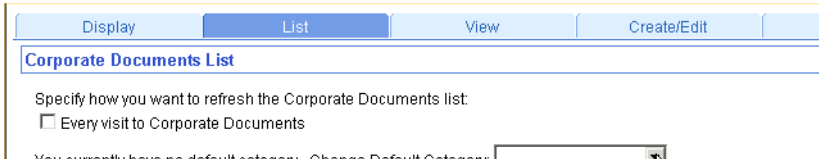
You can define when you want to refresh:

- the Corporate Documents page
- your Inbox
- your universe list

To define your refresh options:

1. Click the Options icon in the InfoView toolbar.
   The Options page appears.
2. Click the **List** tab.
   The List tab appears.
3. Use the *Every visit to Corporate Documents* option to indicate how to refresh

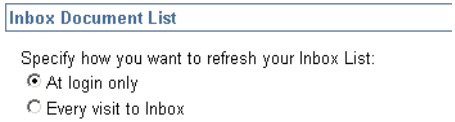
the Corporate Documents page.



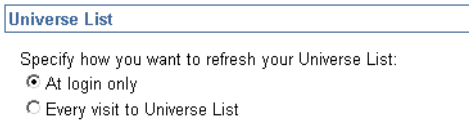
By default, this option is not selected, which means that the Corporate Documents page is refreshed with the same frequency as the InfoView server.

The login process is generally faster if you keep the default setting.

4. To specify a refresh option for your inbox, select either *At login only* or *Every visit to inbox* in the Inbox Document List section.



5. To specify a refresh option for your universe list, select either *At login only* or *Every visit to inbox* in the Universe List section:



6. Click **Apply**.

Specifying your document viewing format

The View tab lets you choose the format in which to view your documents.

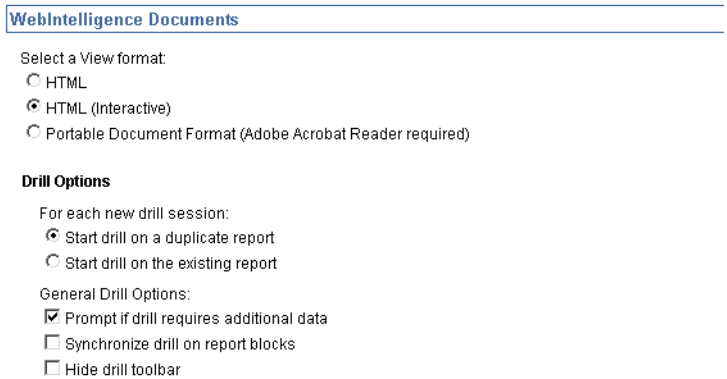
Setting WebIntelligence view and drill options

For WebIntelligence documents, you can specify:

- the view format
- drill options

To specify these:

1. Click the Options icon in the InfoView toolbar.
   The Options page appears.
2. Click the **View** tab.
   The View tab appears.


WebIntelligence Documents
Select a View format:
HTML
HTML (Interactive)
Portable Document Format (Adobe Acrobat Reader required)
Drill Options
For each new drill session:
Start drill on a duplicate report
Start drill on the existing report
General Drill Options:
Prompt if drill requires additional data
Synchronize drill on report blocks
Hide drill toolbar

3. Select the format in which you want to view your documents: HTML, HTML (Interactive), or PDF.
   For more information about these formats, refer to Viewing WebIntelligence documents on page 97.

NOTE

If you want to use the drilling options, you must select either HTML or HTML Interactive.

4. Specify the drill options you want to use.
   Drilling enables you to view additional data that is not initially displayed when

you view a document—it takes you to the next level of information.

The table below explains the difference between the viewing options.

If you select...	in drill mode, you can...	in view mode, you can...
HTML	drill.	N/A
HTML (Interactive)	drill and sort.	filter and sort.

NOTE

These viewing options do not apply for WebIntelligence 2.x documents. You view these in HTML.

5. Select the appropriate drill options, as explained in the following table:

If you want WebIntelligence to...	then...
make a copy of an existing report and then drill on the duplicate	click *Start drill on duplicate report*.
drill on the existing report without making a copy	click *Start drill on existing report*.
prompt you if a drill action requires a new query to extend the scope of analysis	select the *Prompt if drill requires additional data* check box. By default, InfoView does not prompt you when running a new query.
synchronize drilling on all report blocks	select the *Synchronize drill on report blocks* check box. By default, InfoView drills only on the current table or chart.
hide the Drill toolbar when you switch to drill mode	select the *Hide drill bar* check box. By default, InfoView displays the Drill toolbar when you switch to drill mode.

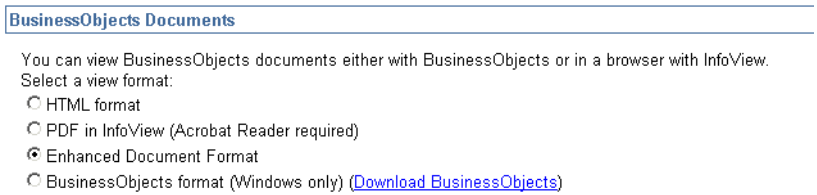
6. Click **Apply**.

Specifying how to view BusinessObjects documents

You can view BusinessObjects documents either with BusinessObjects or in a browser with InfoView.

To select a view format:

1. Click the Options icon in the InfoView toolbar.
   The Options page appears.
2. Click the **View** tab.
   The View tab appears.


BusinessObjects Documents
You can view BusinessObjects documents either with BusinessObjects or in a browser with InfoView.
Select a view format:
HTML format
PDF in InfoView (Acrobat Reader required)
Enhanced Document Format
BusinessObjects format (Windows only) (Download BusinessObjects)

3. Select a view format: HTML, PDF in InfoView, Enhanced Document Format, or BusinessObjects format.
   For more information about these formats, refer to Viewing WebIntelligence documents on page 97.
4. If you do not have BusinessObjects installed you can install it now.
5. For more information, refer to Installing BusinessObjects when viewing a document on page 105.
6. Click **Apply**.

Specifying your user settings

The Create/Edit page lets you define options for creating reports. You can select the type of document you want to create—WebIntelligence or BusinessObjects.

By default, the document type is WebIntelligence and the report panel is Java.

Selecting the type of document you want to create

You can choose to create a WebIntelligence, WebIntelligence OLAP or a BusinessObjects document.

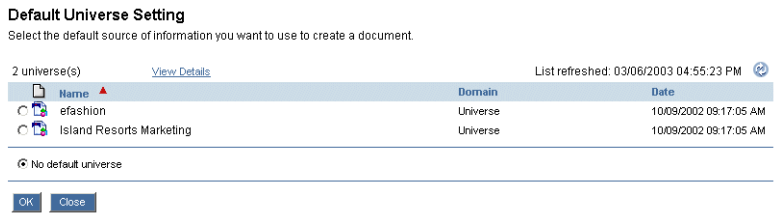
▶ Creating a WebIntelligence document

You create and edit WebIntelligence documents by launching a WebIntelligence report panel from InfoView.

Each report panel is designed for different query and reporting needs. To decide which panel to choose, refer to the *Getting Started with WebIntelligence Guide*.

To select the report panel from InfoView:

1. Click the Options icon in the InfoView toolbar.
   The Options page appears.
2. Click the **Create/Edit** tab.
   The Create/Edit tab appears.
3. Select **WebIntelligence**.
4. If you want to set a default universe, click *Select Default Universe*.
   The Default Universe Setting page appears.



5. Select the universe you want to set as your default.
6. Click **OK**.
7. Select a report panel to use.
8. Click **Apply**.

Creating a WebIntelligence OLAP document

You build reports on multidimensional data sources using WebIntelligence for OLAP Data Sources.

To select the report panel from InfoView:

1. Click the Options icon in the InfoView toolbar.
   The Options page appears.
2. Click the **Create/Edit** tab.
   The Create/Edit tab appears.
3. Select **WebIntelligence OLAP**.
4. Click **Apply**.

For more information, refer to the *WebIntelligence for OLAP User's Guide*.

Creating a BusinessObjects document

To select BusinessObjects as your default report editor, from InfoView:

1. Click the Options icon in the InfoView toolbar.
   The Options page appears.
2. Click the **Create/Edit** tab.
   The Create/Edit tab appears.
3. Select **BusinessObjects**.
4. If you do not have BusinessObjects installed, you can install it now.
   If you choose not to do so, the installation process launches automatically the first you need BusinessObjects for viewing a document.
   For more information, refer to Installing BusinessObjects when viewing a document on page 105.
5. Click **Apply**.

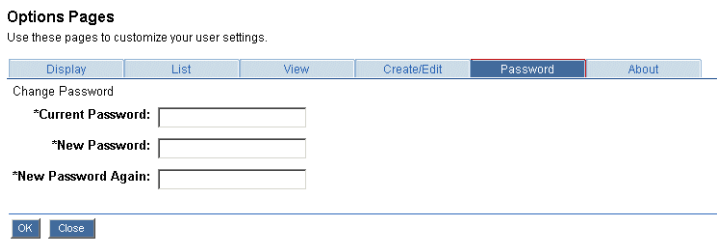
Changing your password

Your initial InfoView password is created by the system administrator who defined your user profile. Once you have logged into InfoView you can change your password to one of your choice, if you have the rights to do so. If your system administrator did not give you the rights to change your password, the Password tab is not displayed in the Options page.

If you change your password in InfoView, your BusinessObjects password is also changed.

To change your password:

1. Click the Options icon in the InfoView toolbar.
   The Options page appears.
2. Click the **Password** tab.
   The Password tab appears.



3. Type your current password in the Current Password box.
4. Type your new password in the New Password box.
   This is case-sensitive.
5. Confirm the new password by typing it again in the New Password again box.
6. Click **Apply**.

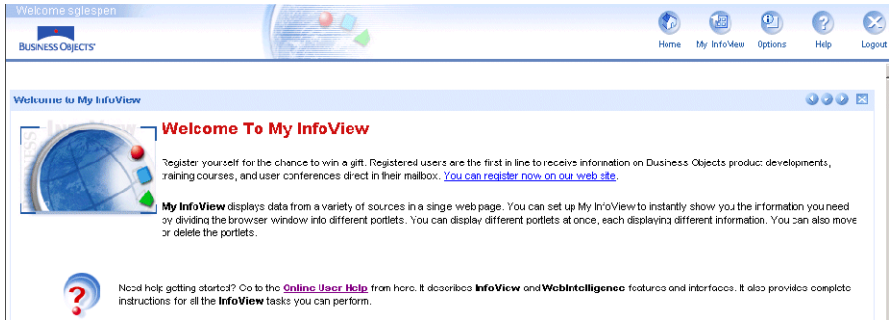
Customizing My InfoView

This section describes My InfoView and how to use it.

My InfoView can display data from a variety of sources in a single page. You can set up My InfoView to instantly show you the information you need by dividing the browser window into three panes, each displaying different information.This allows you to view information from different sources at the same time in your browser window.

You can access My InfoView by clicking the My InfoView button in InfoView toolbar or by selecting My InfoView as your default start page in your user options. The Default My InfoView page.

The default My InfoView page is a welcome page. This page gives a brief overview of My InfoView, plus links to the rest of the portal, and the online help. However, your company administrator can customize this page.


Welcome sglespen
BUSINESS OBJECTS
Home
My InfoView
Options
Help
Logout
Welcome to My InfoView
Welcome To My InfoView
Register yourself for the chance to win a gift. Registered users are the first in line to receive information on Business Objects product developments, training courses, and user conferences direct in their mailbox. You can register now on our web site.
My InfoView displays data from a variety of sources in a singe web page. You can set up My InfoView to instantly show you the information you need by dividing the browser window into different portlets. You can display different portlets at once, each displaying different information. You can also move or delete the portlets.
Need help getting started? Go to the Online User Help from here. It describes InfoView and WebIntelligence features and interfaces. It also provides complete instructions for all the InfoView tasks you can perform.

From the My InfoView welcome page, you can divide your browser window into several panes. You can display up to three panes at once to include:

- Your Inbox documents list—displays the documents you have received from other users in your Inbox.
- Your Corporate Documents page—displays the documents in the Corporate Documents page that you have the rights to view.
- Corporate documents—lets you choose specific documents to display from the Corporate Documents list.

- Your Personal Documents page—displays the documents in your Personal Documents page.
- Personal documents—lets you choose specific documents to display from your Personal Documents page.
- A web page—lets you select a website to display.

What I can do with My InfoView?

With My InfoView you can:

- choose My InfoView as your default start page
  For more information, refer to Selecting your default start page on page 69.
- resize the left pane in My InfoView
  For more information, refer to Resizing the left pane of My InfoView on page 71.
- add portlets to My InfoView
  For more information, refer to Working with portlets on page 85.
- add documents to My InfoView
  For more information, refer to Adding documents to My InfoView on page 92.
- add document lists to My InfoView
  For more information, refer to Adding document lists to My InfoView on page 93.

Working with portlets

A *portlet* is a part of the browser page. In My InfoView you can set aside a section of the browser page to display a portlet of your choice. To do so, you add a web page to My InfoView.

This section explains how:

- panes are displayed
- to add a new portlet
- to move portlets
- to delete portlets

How panes are displayed

My InfoView can display up to three vertical panes. You can specify the size of the left pane in the Options pages.

The choices are:

- Small (25% of the available display space)
- Medium (30% of the available display space)
- Large (as much space as possible)

The center pane is the main pane, and is always the largest. By default, the left pane is set to small.

You can show and hide portlets as follows:

To...	Click...
show a portlet that is not currently on display,	
hide a portlet that is currently on display,	

If a pane does not contain a portlet, the arrow is not displayed and this option is unavailable. If this is the case, you can move or add a portlet to the hidden pane. When you do so, the pane is displayed:

Welcome sglespen
Home
My InfoView
Options
Help
Logout
cnn
google
Welcome to My InfoView
Welcome To My InfoView
Register yourself for the chance to win a gift. Registered users are the first in line to receive information on Business Objects product developments, training courses, and user conferences direct in their mailbox. You can register now on our web site.
My InfoView displays data from a variety of sources in a single web page. You can set up My InfoView to instantly show you the information you need by dividing the browser window into different portlets. You can display different portlets at once, each displaying different information. You can also move or delete the portlets.
Need help getting started? Go to the Online User Help from here. It describes InfoView and WebIntelligence features and interfaces. It also provides complete instructions for all the InfoView tasks you can perform.
BusObj
>> Contact Us | Publications | Site Map | Support
Search
my profile
Company | Products | Solutions | Services | Customers | Partners | Investors | News | Events | Store
The Standard in Business Intelligence

Adding a new portlet to My InfoView

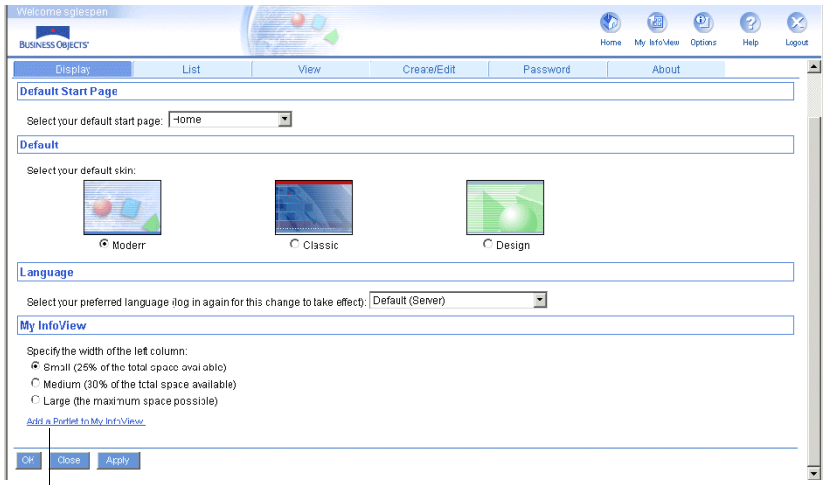
In addition to the documents and document lists described earlier in this chapter, you can add the following pages to My InfoView:

- My InfoView Welcome page
- A web page

Adding a portlet to My InfoView

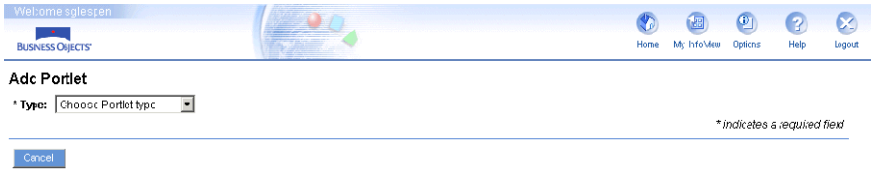
To do this:

1. Click the Options icon.
   The Options page opens.
2. Click the **Display** tab.
   The Display tab appears.



Add a Portlet to My InfoView

3. Click **Add a Portlet to My InfoView**.
   The Add Portlet page appears.



4. Select **Welcome to My InfoView** from the drop-down menu.
   The following page appears:

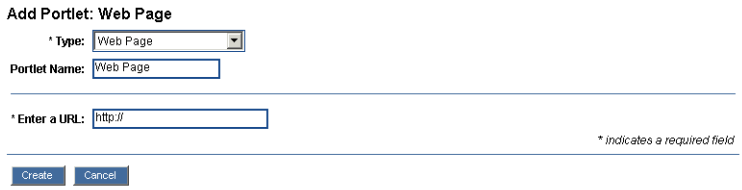
Add Portlet: Welcome to My InfoView
* Type:
Welcome to My InfoView
Portlet Name:
Welcome to My InfoView
The My InfoView Welcome Page is designed to guide you through your first use of My InfoView.
* indicates a required field
Create
Cancel

   The portlet name appears automatically and is not editable.
5. Click **Create**.
   My InfoView opens with the Welcome to My InfoView Portlet showing.
   To return to the Display tab without adding the portlet, click **Cancel**.

Adding a web page as a portlet

To add a web page as a portlet:

1. Click the Options icon in the InfoView toolbar.
   The Options page opens.
2. Click the **Display** tab.
   The Display tab appears.
3. Click **Add a Portlet to My InfoView**, as illustrated above.
   The Add Portlet page appears.
4. Select **Web Page** from the drop-down menu.
   The following page appears:



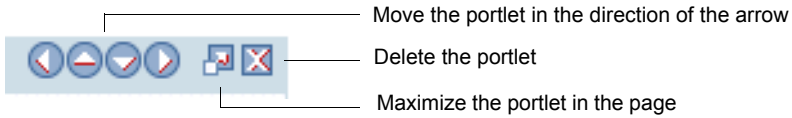
5. Enter a name for the portlet in the Portlet Name text box.
   By default, the portlet name is Web Page. Portlet names do not have to be

unique.

6. Enter the full URL for the web page in the Enter a URL text box.
   An example of a full URL is: http://www.businessobjects.com.
7. Click **Create**.
   My InfoView opens with the web page showing.
   To return to the Display tab without adding the portlet, click **Cancel**.

Moving portlets in My InfoView

Each portlet has a toolbar with one or more of the buttons shown below:



- The up arrow moves the portlet so it is displayed further up in the pane.
- The down arrow moves the portlet so it is displayed further down in the pane.
- The right arrow moves the portlet so it is displayed in the pane on the right.
- The left arrow moves the portlet so it is displayed in the pane on the left of the screen.
- The maximize button either expands the portlet to its largest possible size, or opens it in a new web browser, depending on the portlet type.
- The delete button removes the portlet from My InfoView.

To move a portlet to another place in your My InfoView page

- In the toolbar that belongs to the portlet you want to move, click the arrow that corresponds to the direction you want to move it.

  If a portlet cannot be moved in a specific direction, the corresponding arrow does not appear.

To delete a portlet from My InfoView

1. Click the Delete Portlet button.

   You are asked to confirm that you want to delete the portlet.
2. Click **OK**.

   The portlet disappears. If you delete the last portlet, or if there was only one, the background becomes blank.

To maximize the portlet size

- To maximize a portlet, click the Maximize this page button.

  You can maximize any portlet except the My InfoView welcome page.

EXAMPLE

Customizing your My InfoView page

If your job centers around sales strategy, analysis of the latest sales figures from your company's branches throughout the country is crucial to your work. You may want to set My InfoView to display a web page showing you:

- how your company is doing in the stock market
- a particular document from the Corporate Documents list showing the sales figures that are updated daily
- your Inbox Documents list so you can quickly access the documents sent to you by other people in your company

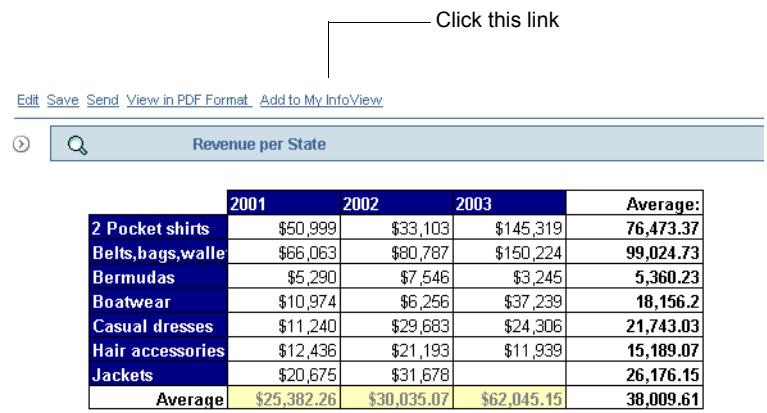
Adding documents to My InfoView

If you can view a document in InfoView, you can also add it to My InfoView and view it in your personalized portal. You can add documents from the Corporate Documents, and Personal Documents pages, including non-Business Objects documents.

The *Add to My InfoView* option is also available in any document viewed with the Enhanced Document Viewer.

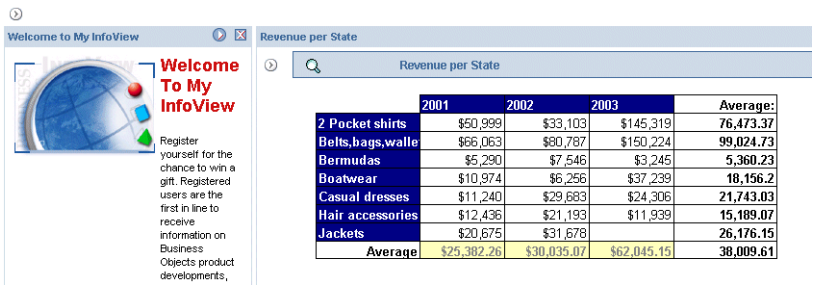
To add a document to My InfoView:

1. Open a document.
2. Click **Add to My InfoView**.



	2001	2002	2003	Average:
2 Pocket shirts	$50,999	$33,103	$145,319	76,473.37
Belts,bags,walle	$66,063	$80,787	$150,224	99,024.73
Bermudas	$5,290	$7,546	$3,245	5,360.23
Boatwear	$10,974	$6,256	$37,239	18,156.2
Casual dresses	$11,240	$29,683	$24,306	21,743.03
Hair accessories	$12,436	$21,193	$11,939	15,189.07
Jackets	$20,675	$31,678		26,176.15
Average	$25,382.26	$30,035.07	$62,045.15	38,009.61

The document is displayed in My InfoView.


Welcome to My InfoView
Welcome To My InfoView
Register yourself for the chance to win a gift. Registered users are the first in line to receive information on Business Objects product developments,
Revenue per State
Revenue per State

	2001	2002	2003	Average:
2 Pocket shirts	$50,999	$33,103	$145,319	76,473.37
Belts,bags,walle	$66,063	$80,787	$150,224	99,024.73
Bermudas	$5,290	$7,546	$3,245	5,360.23
Boatwear	$10,974	$6,256	$37,239	18,156.2
Casual dresses	$11,240	$29,683	$24,306	21,743.03
Hair accessories	$12,436	$21,193	$11,939	15,189.07
Jackets	$20,675	$31,678		26,176.15
Average	$25,382.26	$30,035.07	$62,045.15	38,009.61

Adding document lists to My InfoView

In addition to individual documents, you can also add lists of documents to My InfoView.

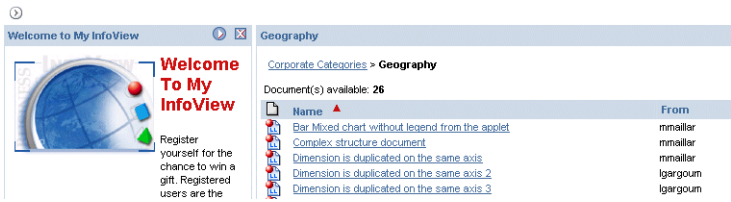
In the Corporate Documents, Personal Documents, and Inbox pages, the *Add to My InfoView* option adds the current category to My InfoView.

To add a document list to My InfoView:

1. Open a document list.
2. Click **Add to My InfoView**.

Welcome sglespen
BUSINESS OBJECTS
Geography
Corporate Categories > Geography
Categories: North America (1) Oceania (1) South America (3)
19 Document(s) in Geography View Details Add to My InfoView
Name
From
Bar Mixed chart without legend from the applet
Complex structure document
Dimension is duplicated on the same axis
Document
Document for Full edition in dHTMLClient
mmaillar

The document list is displayed in My InfoView.


Welcome to My InfoView
Welcome To My InfoView
Register yourself for the chance to win a gift. Registered users are the
Geography
Corporate Categories > Geography
Document(s) available: 26
Name
From
Bar Mixed chart without legend from the applet
Complex structure document
Dimension is duplicated on the same axis
Dimension is duplicated on the same axis 2
Dimension is duplicated on the same axis 3
mmaillar
lgargoum

Viewing and Refreshing Documents

chapter 6

Overview

This chapter describes how to view and refresh different document types in InfoView.

The Home page gives you direct access to the document viewing areas of the InfoView portal. It provides links to the pages where the different groups of document lists are stored. Depending on your user rights, the following may be available:

- Corporate Documents
- Personal Documents
- Inbox Documents
- Scheduled Documents

To view an existing WebIntelligence or BusinessObjects document, or a non-Business Objects document, just click the document's name. If the document was created in WebIntelligence or BusinessObjects, it may contain a user prompt.

To open more than one window simultaneously to view more than one document, launch a second browser and log in for a second time.

Viewing WebIntelligence documents

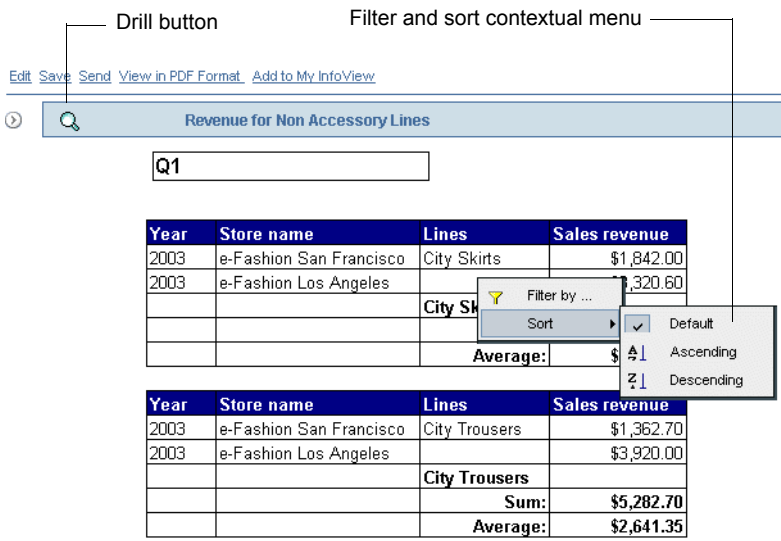
You can view WebIntelligence documents in the following formats:

- HTML
- HTML (Interactive)
- PDF

Viewing WebIntelligence documents in HTML format

Depending on whether you want to simply view results or interact with the results you view, you can select one of two HTML options:

- HTML – use if you simply want to navigate reports to view results, and refresh the report data to see the latest figures. The values displayed in the report tables and charts are static, but can be refreshed.
- HTML (Interactive) – use if you want to filter or sort the values displayed in the reports, or perform drill analysis. When you rest your mouse pointer on a report value, a contextual menu appears with the sort and filter options and/or the drill button:



NOTE

The drill feature is available in both HTML (Interactive) and in static HTML.

When you view WebIntelligence documents in HTML (Interactive) format, you can:

- filter report values
- sort report values
- drill report values to analyze the related detail and summary data

Available actions vary according to the graphical element being clicked and its content. Just click elsewhere in the document to make the menu disappear.

For more information, refer to the *Getting Started with WebIntelligence Guide*.

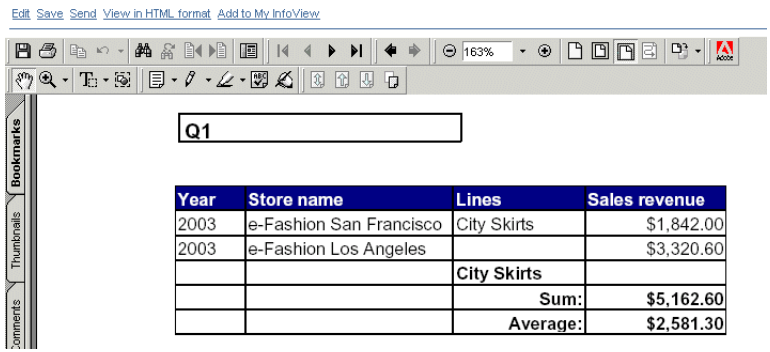
NOTE

You need the appropriate security profile to use the filter, sort, and drill features.

You can cancel the opening or refreshing of a WebIntelligence document by clicking **Cancel**.

Viewing WebIntelligence documents in PDF

Viewing documents in PDF is useful if you want to print documents or if you want to send documents to business contacts who do not have access to WebIntelligence.


Edit Save Send View in HTML format Add to My InfoView
163%
Bookmarks
Thumbnails
Comments
Q1
Year | Store name | Lines | Sales revenue
2003 | e-Fashion San Francisco | City Skirts | $1,842.00
2003 | e-Fashion Los Angeles | | $3,320.60
| | City Skirts |
| | Sum: | $5,162.60
| | Average: | $2,581.30

NOTE

To open files in PDF, you need Adobe Reader installed on your computer. You can download this from http://www.adobe.com.

Viewing BusinessObjects documents

You can view BusinessObjects documents either with BusinessObjects or in a browser with InfoView. The default format in which you view BusinessObjects documents depends on the browser and the operating system you use.

You must select the format in which you want to view your document. You do this in the View tab of the Options page. For more information, refer to Specifying your document viewing format on page 76.

There are four document formats to choose from:

- HTML format
- PDF format
- Enhanced document format
- BusinessObjects (for Windows only)

Choosing a view format

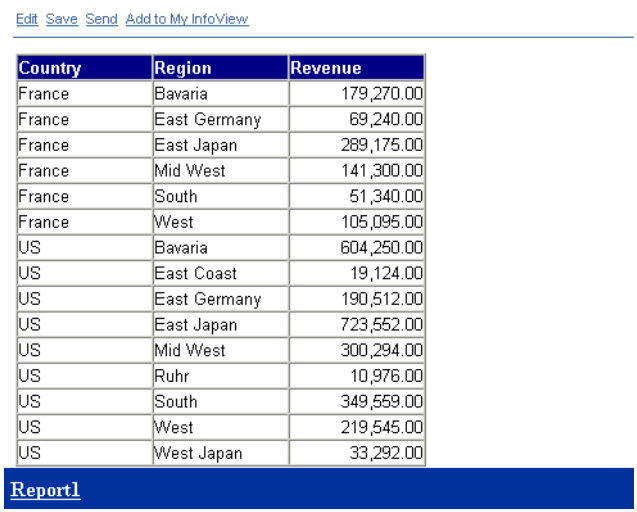
The default format in which you view BusinessObjects documents depends on the browser and the operating system you use. If you want to be able to view BusinessObjects documents as they appear in BusinessObjects, but do not have access to BusinessObjects yourself, you can choose either Enhanced document format or PDF format. Alternatively you can also choose to view BusinessObjects documents in standard HTML format.

Viewing BusinessObjects document in HTML format

When you open a BusinessObjects document in standard HTML format, the BusinessObjects tabs are converted into hyperlink text, and appear at the bottom of the screen. You can use these to view individual reports within the document.

You can view documents easily and rapidly in HTML format. However, some browsers have printing restrictions that affect HTML—which means that when you print the document, you may find certain document elements missing from the printout.

When you open a BusinessObjects document in HTML format it looks like this:



Country	Region	Revenue
France	Bavaria	179,270.00
France	East Germany	69,240.00
France	East Japan	289,175.00
France	Mid West	141,300.00
France	South	51,340.00
France	West	105,095.00
US	Bavaria	604,250.00
US	East Coast	19,124.00
US	East Germany	190,512.00
US	East Japan	723,552.00
US	Mid West	300,294.00
US	Ruhr	10,976.00
US	South	349,559.00
US	West	219,545.00
US	West Japan	33,292.00

The values displayed in the report tables and charts are static. Viewing documents in HTML format is useful if you simply want to navigate reports on screen to view results, and refresh the report data to see the latest figures.

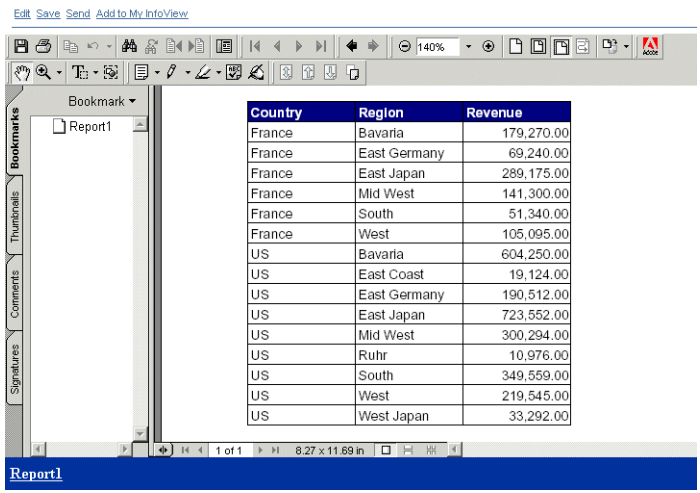
Viewing Businessobjects documents in PDF format

You must have Adobe Reader installed on your machine in order to view PDF documents in InfoView.

When you open a BusinessObjects document in PDF format, Adobe Reader automatically launches and appears in the page contents area of your InfoView page.

To view another report, click on the report titles that appear below the document as hyperlinks. If the BusinessObjects report contains multiple sections, these appear below the report title in the Bookmarks pane. You can also print the PDF document.

When you open a BusinessObjects document in PDF format it looks like this:



Country	Region	Revenue
France	Bavaria	179,270.00
France	East Germany	69,240.00
France	East Japan	289,175.00
France	Mid West	141,300.00
France	South	51,340.00
France	West	105,095.00
US	Bavaria	604,250.00
US	East Coast	19,124.00
US	East Germany	190,512.00
US	East Japan	723,552.00
US	Mid West	300,294.00
US	Ruhr	10,976.00
US	South	349,559.00
US	West	219,545.00
US	West Japan	33,292.00

Viewing documents in PDF format is useful if you want to print documents, or if you want to send documents to business contacts who do not have access to BusinessObjects.

Viewing BusinessObjects documents in enhanced document format

The enhanced document viewer

The Active X document viewer lets you view BusinessObjects documents as they appear in BusinessObjects. You can navigate through the document by sections, and zoom into the document. The Active X document viewer reads the documents in enhanced document format.

Changing the language of the viewer

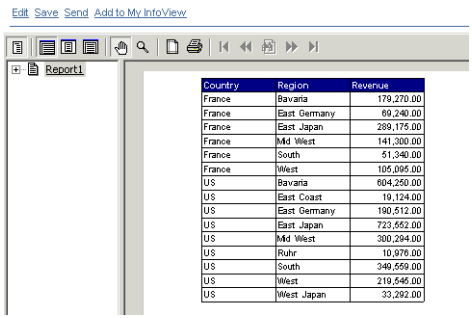
Even if your administrator has switched InfoView to a different language, the language of the document viewer remains the same because it resides on your desktop, not on the server.

To change the language of the viewer you can:

- Ask your administrator to change the language on the server side.
- Delete the file corresponding to the document viewer that you are currently using.
- View a document in the new language. Doing this means the viewer is automatically downloaded the in the new language to your desktop from the server.

When you open a document in enhanced format, it looks as if it has been opened in BusinessObjects.

The following image shows an example of a document opened in enhanced format.

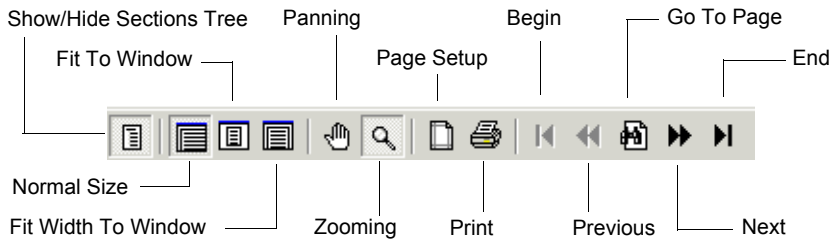


You see the same formatting as in BusinessObjects, including page headers and footers which you do not see in HTML documents. You can also take advantage of BusinessObjects' navigation and zooming features.

Fonts that are unavailable with HTML are perfectly rendered in this format.

When you view documents in enhanced format, the viewer toolbar provides additional features for viewing, browsing and printing document.

This image shows additional toolbar features for viewing, browsing, and printing documents in enhanced format, explained below.



These features are explained in the table below.

Feature	Description
Show/Hide Sections Tree	Lets you show or hide the navigation window on the left of the document. The navigation window allows you to jump from section to section within the document.
Normal Size	Displays the document in the display window.
Fit to Window	Fits the document to the size of the display window.
Fit Width to Window	Widens the document to the width of the window.
Panning	Enables you to move the document up or down on screen, using a hand-shaped cursor.
Zooming	Enables you to zoom in or out, by clicking the document.
Page Setup	Enables you to select margin size, paper size, and document orientation.
Print	Enables you to set print options, and print the document.
Begin	Displays the first page of the document.
Previous	Displays the previous page in the document.

Feature	Description
Go To Page	Lets you specify the page you want you view.
Next	Displays the next page in the document.
End	Displays the last page of the document.

Viewing BusinessObjects documents in BusinessObjects format

If your user rights allow it, you can also view BusinessObjects documents in BusinessObjects format, using either of the following methods:

- Opening and viewing a document from its current location; this allows you to view the contents of the file.
- Saving the file to disk; this allows you to save the file to your computer.

To view a BusinessObjects document in InfoView:

1. Ensure that BusinessObjects is selected as your editor in the Options page.
2. Click the name of the document.

   If installed, BusinessObjects automatically launches each time you open a BusinessObjects document. If BusinessObjects is not installed on your computer, the BusinessObjects installer is launched.

   If InfoView detects that there is a more recent version of BusinessObjects available, it prompts you to update the version of BusinessObjects installed on your computer.

▶ Installing BusinessObjects when viewing a document

To do this:

1. Log into your Windows machine with installation rights.
2. Click a BusinessObjects document in any InfoView document list to open it.

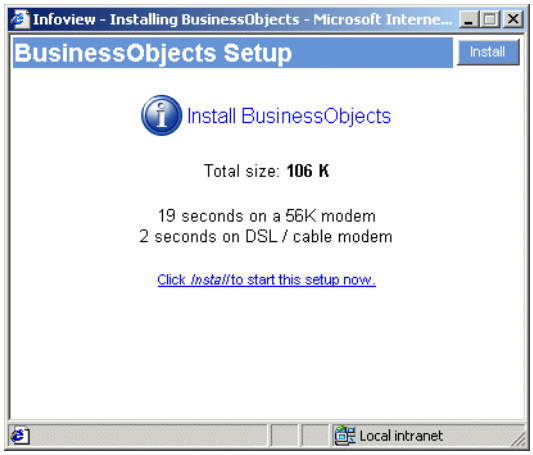
   If you do not already have BusinessObjects installed, the BusinessObjects installation wizard appears.
3. Click **Next**.
4. Select a location for the BusinessObjects program files.

   By default, the files are installed to C:\Program Files\Business Objects.
5. To install the files to another location, select **Install to folder**.
6. Enter a new path in the text box, and click **Next**.

   The BusinessObjects setup window appears.
7. Follow the steps to install BusinessObjects.

Installing BusinessObjects from the Options page

1. From View tab, click **Download BusinessObjects**.
   The BusinessObjects Setup window appears.


Infoview - Installing BusinessObjects - Microsoft Interne...
BusinessObjects Setup
Install
Install BusinessObjects
Total size: 106 K
19 seconds on a 56K modem
2 seconds on DSL / cable modem
Click Install to start this setup now.
Local intranet

2. Click the installation link to install BusinessObjects.
   An *Installing BusinessObjects* message appears while BusinessObjects is being installed.
3. When the installation finishes, click **Close**.

For more information about BusinessObjects, refer to the *BusinessObjects User's Guide: Accessing Data and Data Analysis*, and the *BusinessObjects User's Guide: Reporting Techniques and Formatting*.

Viewing non-Business Objects documents

Your document lists may contain documents created in applications other than BusinessObjects and WebIntelligence. You can view, send, and save any of these documents if your user rights allow you to do so.

NOTE

To view a non-BusinessObjects document, you must have an application that can display the document installed on your computer. For example, if you want to view a Microsoft Word document in InfoView, you must have Word or another suitable document viewer installed.

Some examples of the types of documents you can view in InfoView are:

- **Microsoft Word documents**

When you open a Microsoft Word document in InfoView, the document opens in Microsoft Word format with the standard formatting toolbar.

- **Microsoft Excel spreadsheets**

When you open an Excel spreadsheet, the document appears in an Excel page in the InfoView window.

The way the Excel document appears in your InfoView window depends on the browser you use.

If your rights allow it, you can edit the cell contents of the spreadsheet. However, you can save the changes only to your local machine, not to the repository.

- **Portable Document Format (PDF) files**

When you view a PDF file in InfoView, the standard Acrobat Viewer window and toolbar allows you to navigate and zoom on the document.

Refreshing documents

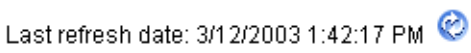
When you refresh a document, WebIntelligence or BusinessObjects retrieves the data defined in the document from the database and returns the updated values to the report(s) in the document.

You can update the data in a document while keeping the same presentation and formatting. You can update the data displayed in a document if you have a connection to the data source.

You can refresh documents in the following ways:

- manually, whenever you choose
- by scheduling with Broadcast Agent
- every time you open a document

WebIntelligence documents display the last time they were refreshed.



For information about refreshing document lists, refer to Specifying document list refresh options on page 73.

You can cancel the opening or refreshing of a WebIntelligence document by clicking **Cancel**.

Refreshing a document manually

You can refresh any open document or document list manually as long as you have refresh rights to the universe used to create the document.

To refresh a document manually, simply click **Refresh Document**. When you do this, InfoView submits the document to the server for refreshing, then displays the new results.

If the document contains a user prompt, however, a dialog box appears instead, prompting you for information. For information about filling in prompt values, refer to Viewing documents with prompts on page 110.

Refreshing a document with Broadcast Agent

For more information, refer to Scheduling documents on page 167.

Refreshing a document when you open it

When you save a document, you can specify whether or not a document refreshes when opened. For BusinessObjects documents, you do this using BusinessObjects; for WebIntelligence documents, you can do this using either WebIntelligence or InfoView.

Prompts

Prompts display a question or a list of values each time you refresh the report data in a document. You answer the prompt by typing or selecting specific values. Only the data that corresponds to those values is returned.

Using prompts means that you can view data specific to a time period, product line, geography, or customer account in the same document each time you refresh it. A single document can contain one or more prompts.

Viewing documents with prompts

Prompts are dynamic filters that allow you to specify the values you want WebIntelligence to retrieve from the database and return to the document. Prompts enable you to limit the document data to the information that corresponds to a specific business question.

For example, if you want to view information for a specific account, a prompt can enable you to enter the account number for which you want to retrieve information.

The way you are prompted depends on whether the document is set to refresh automatically or not each time you open it:

- If the document is not set to refresh on opening, the document opens and you can view the values filtered by the prompt, and the last time the document was refreshed, in the Prompts pane.
- If the document is set to refresh the data before you can open it, you need to answer the prompts so that BusinessObjects or WebIntelligence knows which values to return to the document.

Document creators can include condition prompts in documents, which means that when you open or refresh the document, you are asked to provide information that will restrict the amount of data returned. For example, you may be asked to enter the particular year for which you want financial information. If you do not provide this information, you cannot view the document.

The types of prompts you see may vary slightly according to whether the document was created using WebIntelligence or BusinessObjects, but in general, you can be asked for information in two ways:

- You can be prompted to select values from a predefined list
- You can be prompted to enter values

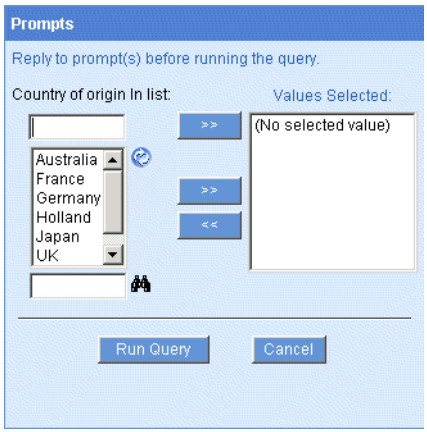
For more information about viewing documents that contain prompts, refer to the *Getting Started with WebIntelligence Guide* and the *BusinessObjects User's Guide: Accessing Data and Data Analysis*.

Searching lists of values

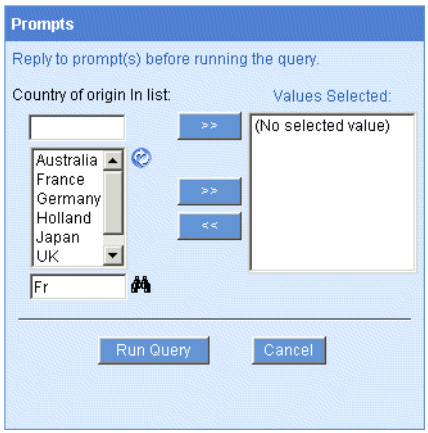
When viewing a WebIntelligence document with prompts, you can perform a search within the list of values.

To search a list of values:

1. Open a WebIntelligence document in InfoView.
2. Refresh the document.
   The following screen appears.

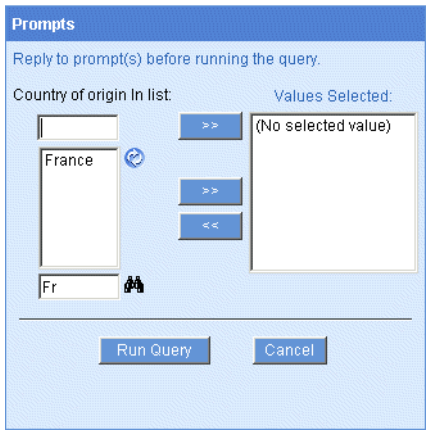


3. Enter a keyword or sentence or simply a part of the word.in the text box.



Please note that the search is case-sensitive. In the screen above, if you enter "fr" instead of "Fr", no values are returned.

4. Click the binoculars icon.
   Any matching values are returned.



5. Select the desired value.

NOTE

This feature is only available once you refresh the WebIntelligence document.

Using wildcards to answer prompts quickly

Very large databases can contain thousands of values for each table column or row. Sometimes prompts are designed so that you can retrieve data for information that has a letter or number series in common. For example, you want to retrieve data for all customers whose family name begins with "Mac" or whose year of birth is sometime in the 1970s.

To retrieve data with a shared alphanumeric strings, you can combine part of the string with wildcards. For example, you can combine the characters Mac with the% wildcard character to find all the customers with Mac as part of their family name, such as MacDermott, MacPherson, MacMillan. To do this, you type:

Mac%

NOTE

The% wildcard character is generally supported by standard corporate databases. Other specific wildcard characters are supported by specific databases.

Creating and Editing Documents

chapter 7

Overview

This chapter briefly explains how to create and edit WebIntelligence and BusinessObjects documents.

For more information, refer to the *Getting Started with WebIntelligence Guide* and the *BusinessObjects User's Guide: Reporting Techniques and Formatting*.

You create BusinessObjects and WebIntelligence reports on corporate data by selecting a data source called a *universe*. The universe provides a link between your corporate databases and the indicators you use to analyze your business activities.

For example, if your business is a national retailer, then a universe on your corporate data typically includes indicators such as <Region>, <Product Line>, and <Revenue>.

Creating new WebIntelligence documents

You create WebIntelligence documents by selecting a universe in InfoView.

This section tells you how to:

- select a universe
- select a universe as your default universe for all new documents

Selecting a universe

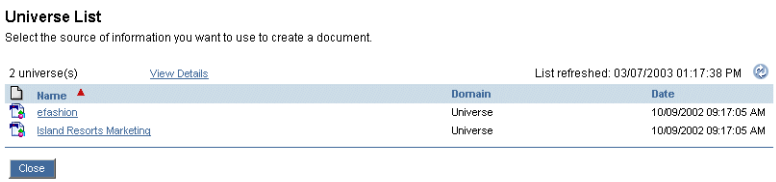
To select a universe:

1. Ensure that you have selected **WebIntelligence** as your document type in the Create/Edit Options page.

   For more information about these settings, refer to Specifying your user settings on page 80.

1. From the InfoView Home page, click either **New Document** or **Universe**.

   A list of available universes appears.



2. The next step depends on whether or not you use the same universe by default each time you create a new document.

If you have...	then...
a default universe,	the WebIntelligence report panel opens directly.
no default universe,	the list of universes appears. Select the universe on which you want to create a document. The WebIntelligence report panel opens.

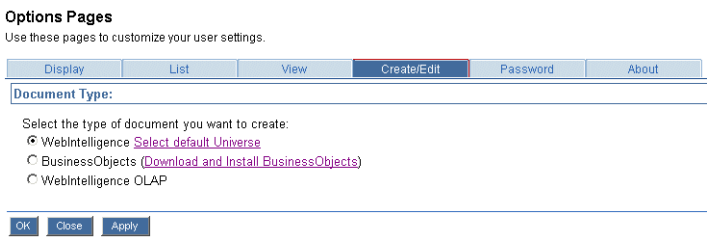
3. You can define the data and report properties for the new document.

For more information on creating WebIntelligence documents refer to the *Getting Started with WebIntelligence Guide*.

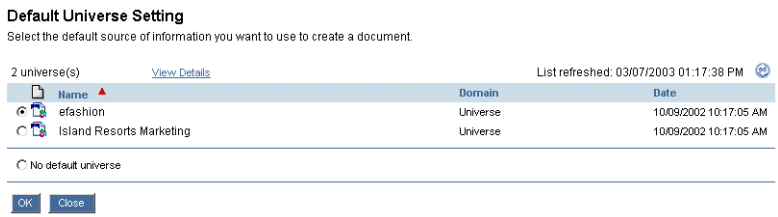
Setting a default universe

To set a default universe:

1. Click the Options icon in the InfoView toolbar.
   The Options page appears.
2. Click the **Create/Edit** tab.
   The Create/Edit page appears.



3. Select **WebIntelligence**.
4. Under the Document Type section, click **Select default Universe** in the WebIntelligence section.
   The list of universes appears.



5. Select the universe you want to set as your default universe for new documents.
6. Click **OK**.

From now on, the default universe appears in the WebIntelligence Report Panel automatically when you click New Document on the InfoView Home page.

If you do not set a default universe, or you select the *No Default Universe* setting, you are prompted to select a universe each time you create a document.

For more information on creating WebIntelligence documents refer to the *Getting Started with WebIntelligence Guide*.

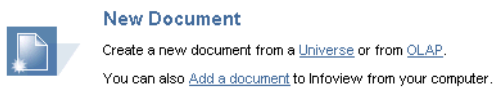
Creating new WebIntelligence OLAP documents

You create WebIntelligence OLAP documents by selecting a OLAP data source. You must have general supervisor rights to create or edit an OLAP data source.

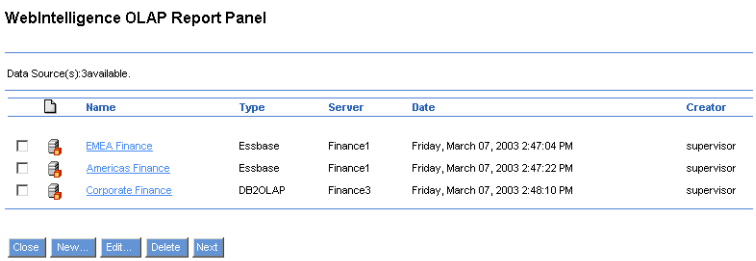
To create a WebIntelligence OLAP document:

1. Ensure that you have selected **WebIntelligence OLAP** as your document type in the Create/Edit Options page.

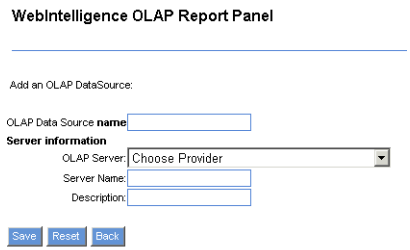
   For more information about these settings, refer to Specifying your user settings on page 80.
2. From your Home page, in the New Documents area, click **OLAP**.


New Document
Create a new document from a Universe or from OLAP.
You can also Add a document to Infoview from your computer.

The WebIntelligence OLAP Report Panel appears.



3. Click **New**.
   The following page appears:



4. Enter a name for the data source.
5. From the OLAP server drop-down menu, select the data provider to use.
6. Enter the name of the server on which the OLAP server resides.
7. Enter a description for this data source.
8. Click **Save**.
   You are returned to the WebIntelligence report panel, and the document you have created is displayed in the list of data sources.

For information on adding, editing or deleting data sources, refer to the *WebIntelligence for OLAP User's Guide*.

NOTE

Depending on your rights, may be asked for user ID and password while working with OLAP.

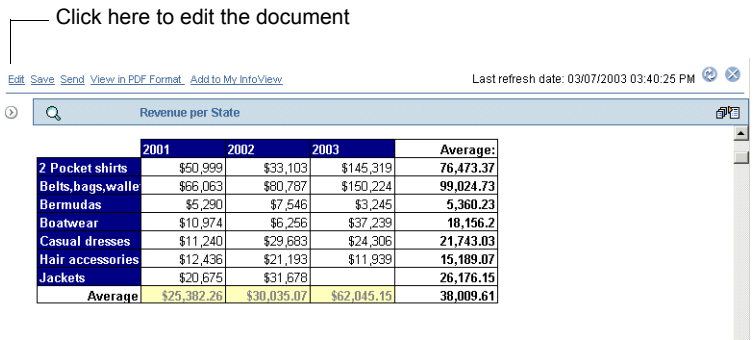
NOTE

WebIntelligence OLAP does not run on UNIX. Do not select a UNIX-only Broadcast Agent when creating a WebIntelligence OLAP task.

Editing WebIntelligence documents

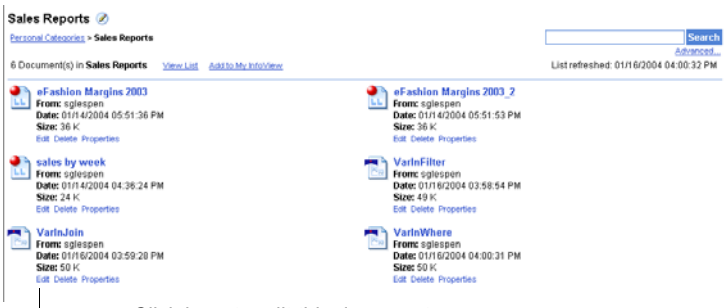
You can open a WebIntelligence document for editing in two ways:

- Click the document name to open the document, then click **Edit**.


Click here to edit the document
Edit Save Send View in PDF Format Add to My InfoView
Last refresh date: 03/07/2003 03:40:25 PM
Revenue per State

	2001	2002	2003	Average:
2 Pocket shirts	$50,999	$33,103	$145,319	76,473.37
Belts,bags,walle	$66,063	$80,787	$150,224	99,024.73
Bermudas	$5,290	$7,546	$3,245	5,360.23
Boatwear	$10,974	$6,256	$37,239	18,156.2
Casual dresses	$11,240	$29,683	$24,306	21,743.03
Hair accessories	$12,436	$21,193	$11,939	15,189.07
Jackets	$20,675	$31,678		26,176.15
Average	$25,382.26	$30,035.07	$62,045.15	38,009.61

- From the document list containing the document, click **View Details** to view the document details without opening the document, then click **Edit** next to the document you want.



Both these actions have the same result: the document opens in the WebIntelligence report panel selected on the Create/Edit options page.

For information on editing documents using the WebIntelligence report panels, refer to the *Getting Started with WebIntelligence Guide*.

Creating new BusinessObjects documents

To create a new BusinessObjects document:

1. Ensure that you have selected **BusinessObjects** as your document type in your Create/Edit Options page.

   For more information about these settings, refer to Specifying your user settings on page 80.

2. In the New Document section, click either **New Document** or **BusinessObjects**.

   BusinessObjects starts. Depending on your settings, the New Report Wizard may appear in a new window:

   - If so, follow the steps in this wizard.
   - If not, click File > New.

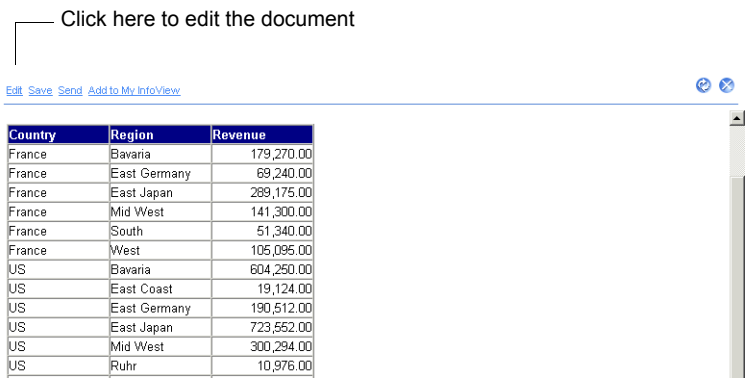
For more information, refer to the *BusinessObjects User's Guide: Reporting Techniques and Formatting*.

Editing BusinessObjects documents

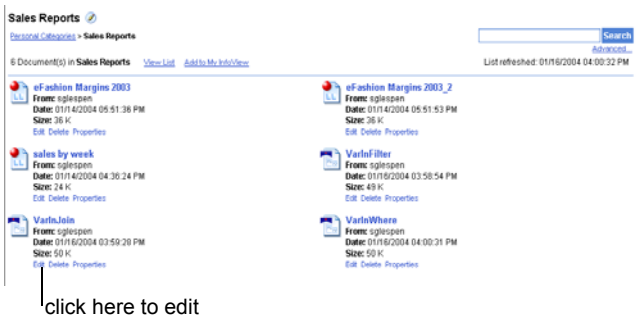
If you have the rights, you can edit BusinessObjects documents from within InfoView.

You can open a BusinessObjects document for editing in two ways:

- Click the document name to open the document, then click **Edit**.



- From the document list containing the document, click **View Details** to view the document details without opening the document, then click **Edit** next to the document you want.



Both these actions have the same result: the document opens in BusinessObjects.

For more information on editing BusinessObjects documents, refer to the *BusinessObjects User's Guide: Reporting Techniques and Formatting*.

Managing Documents

chapter 8

Overview

This chapter explains the types of documents you can work with in InfoView, and describes how you can:

- add documents
- delete documents
- print documents
- view all documents
- view uncategorized documents
- view document properties
- choose data providers

For information on, refer to Viewing and Refreshing Documents on page 95.

Document types

The table below lists the different document types that are available to you through InfoView. Each document type can be identified by its icon, and by a tooltip that appears when you point to the icon.

The table below lists the document types you can see in InfoView.

Document types appear also as tooltips on the document icons.

Document type	Icon
BusinessObjects (.rep)	
BusinessObjects Add-In (.wpy)	
BusinessQuery (.bqy)	
WebIntelligence (.wid)	
WebIntelligence OLAP	
WebIntelligence version 2.x documents (.wqy)	

Document type	Icon
Archive document (.zip)	
Microsoft Word (.doc)	
Microsoft Excel (.xls)	
Microsoft PowerPoint (.ppt)	
PDF (.pdf)	
Text document (.txt)	
Any document not listed above	

Adding a document to InfoView

Adding a document involves taking a non-Business Objects document from your computer or system, and adding it to InfoView.

For example, you can add a Microsoft Excel document by saving it to the Corporate Documents page or to your Personal Documents page.

You can also make a document available to other users by sending it to them. This allows you to use InfoView to distribute documents within your company.

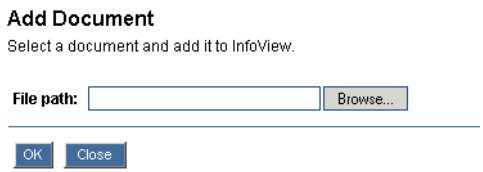
NOTE

You cannot add a document that has no file extension.

Adding a non-Business Objects document to InfoView

To add a non-Business Objects document and make it available to other users:

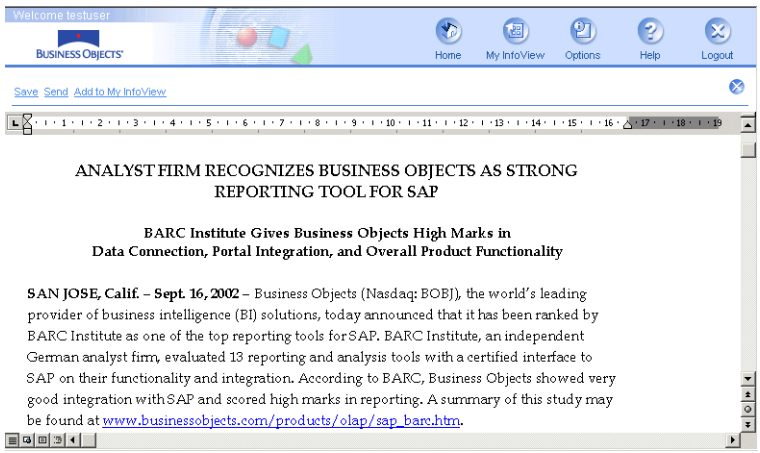
1. In the New Document section of the Home page, click *Add a document*.
   The **Add Document** window appears.



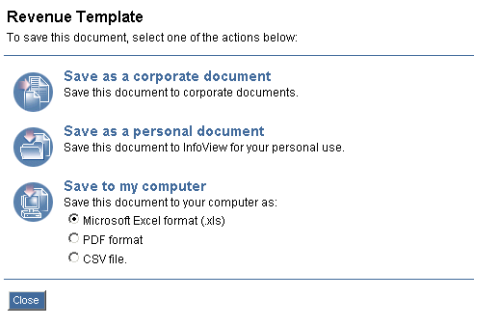
2. Click **Browse** to search for the document, or enter the file name with its path

in the File Path text box.

3. Click **OK**.
   The document opens in InfoView.


Welcome testuser
BUSINESS OBJECTS
Home
My InfoView
Options
Help
Logout
Save Send Add to My InfoView
ANALYST FIRM RECOGNIZES BUSINESS OBJECTS AS STRONG REPORTING TOOL FOR SAP
BARC Institute Gives Business Objects High Marks in Data Connection, Portal Integration, and Overall Product Functionality
SAN JOSE, Calif. – Sept. 16, 2002 – Business Objects (Nasdaq: BOBJ), the world's leading provider of business intelligence (BI) solutions, today announced that it has been ranked by BARC Institute as one of the top reporting tools for SAP. BARC Institute, an independent German analyst firm, evaluated 13 reporting and analysis tools with a certified interface to SAP on their functionality and integration. According to BARC, Business Objects showed very good integration with SAP and scored high marks in reporting. A summary of this study may be found at www.businessobjects.com/products/olap/sap_barc.htm.

4. Click **Save**.
   A Save page appears.


Revenue Template
To save this document, select one of the actions below:
Save as a corporate document
Save this document to corporate documents.
Save as a personal document
Save this document to InfoView for your personal use.
Save to my computer
Save this document to your computer as:
Microsoft Excel format (.xls)
PDF format
CSV file.
Close

5. Select the document area where you want to save the document:
   - Corporate
   - Personal
   - My Computer

Your choice here determines the page that appears next, as each save action requires specific information. For more information about the pages that follow, and how to complete them, refer to Saving documents on page 155.

Printing documents from InfoView

To print a document, you must first open it in InfoView. You can then print it in one of three ways:

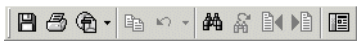
- HTML
- Enhanced viewer for BusinessObjects documents
- PDF

Printing from HTML

Business Objects recommends printing your HTML documents in PDF format, as this offers the highest quality printouts.

To view HTML in PDF format, open your document and click **View in PDF Format** above the document.

Then click **Print** in the Adobe Reader toolbar.



Printing from the enhanced document viewer for BusinessObjects documents

The Page Setup button in the toolbar enables you to set margin size, paper format, and page orientation.

Click **Print** in the enhanced document viewer toolbar.

For the enhanced document viewer, the toolbar looks like this:

NOTE

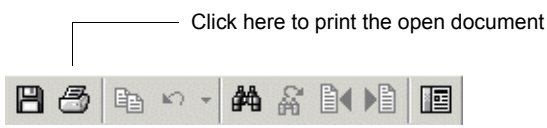
If you click **Print** from your browser's **File** menu, the document will not print correctly.

Printing from PDF format

Open your document in PDF format, or click View in PDF Format link if this is not the default View format. Your document will open in your InfoView window with the Adobe Reader toolbar.

To print your document in PDF format, simply click the Print button in the toolbar.

For a PDF file, the toolbar looks like this:



NOTE

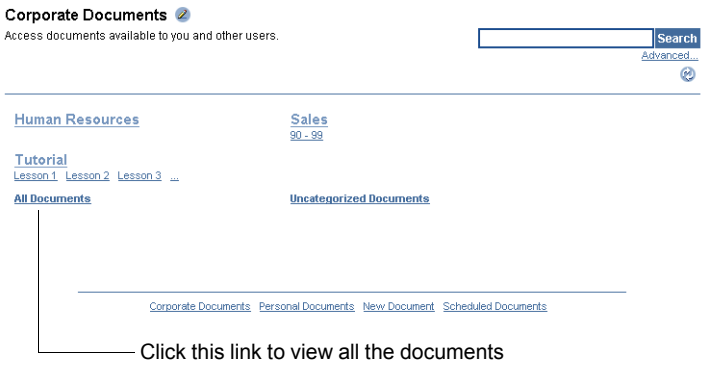
If you click **Print** from your browser's **File** menu, the document will not print correctly.

Viewing all documents

You can choose to view all the documents in both the Corporate Documents page and your Personal Documents page. You may want to do this if you do not know where a specific document has been stored, for example.

To view all the documents in an area:

1. Navigate to either the Corporate Documents Home page or your Personal Documents Home page.
2. Click **All Documents**.



All the corporate (or personal) documents, including uncategorized ones, are shown in one list.

NOTE

When you view documents in this way, subcategories are not shown.

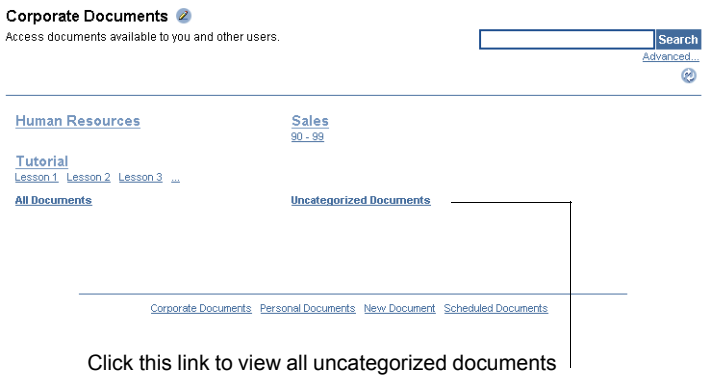
Viewing uncategorized documents

In both the Corporate Documents page and your Personal Documents page, you can create categories to make it easier to find your documents. For more information, refer to Managing Categories on page 139.

You can also view a list of all the documents that have not been assigned to any categories.

To do this:

1. Navigate to either the Corporate Documents Home page or your Personal Documents Home page.
2. Click **Uncategorized Documents**.



All uncategorized documents are shown.

Deleting documents

You can delete:

- any document from your Personal Documents and Inbox pages
- any corporate document you created
- other corporate documents—if you have the necessary rights

When you have the right to delete a corporate document, a check box is displayed next to the document name when you view the document list in compact mode.

You can select and delete multiple documents at once.

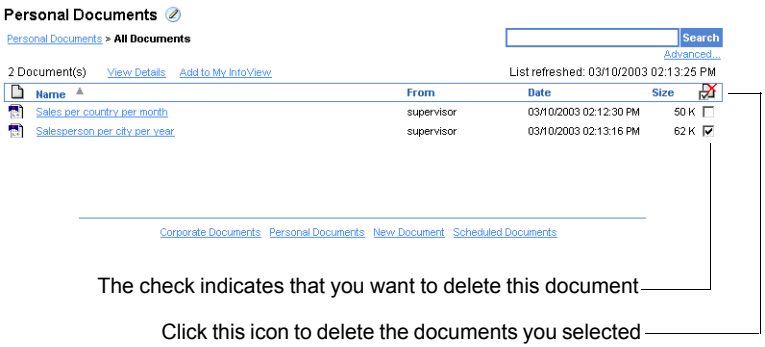
You can delete documents in two ways:

- from a document list
- from the document details view

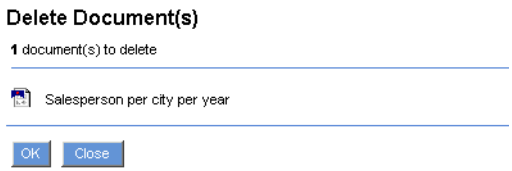
Deleting documents from a list

To do this:

1. From the Home page, go to the location where the documents are saved.
2. Select the check boxes of the documents you want to delete:



3. Click the Delete Selected Document(s) icon shown above.
   The following confirmation message appears:



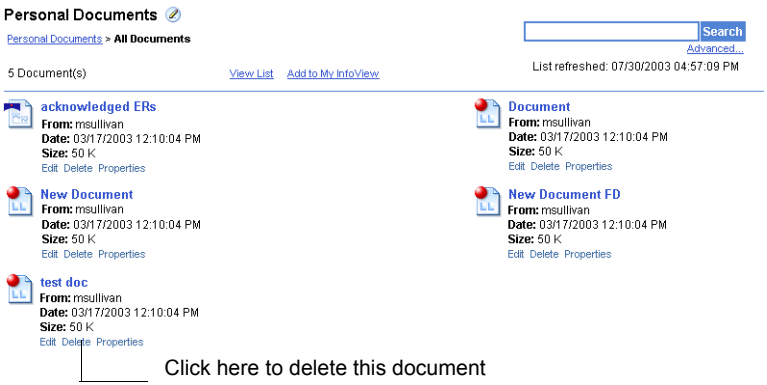
4. Click **OK**.
   A message tells you when InfoView has successfully deleted the documents.
5. Click **OK** to return to the documents list.
   The deleted documents no longer appear in the list.

Deleting documents from the document details view

If you have the user rights you can also delete in the documents list.

To do this:

1. Click **View Details** to display document details.



2. Click **Delete** for the appropriate document.
   A confirmation message appears.

3. Click **OK**.
   A message tells you when InfoView has successfully deleted the documents.
4. Click **OK** to return to the documents list.

The deleted document no longer appears in the list.

NOTE

Once you have deleted a document, there is no way to retrieve it.

Viewing document properties

Every document that you can view in InfoView has certain properties, such as its description, the categories it belongs to, and its keywords.

You can view document properties in two ways:

- via the document list details view—this provides basic information such as the sender/publisher, size, and creation date
- via the Properties page—this provides more details, including data provider and category information

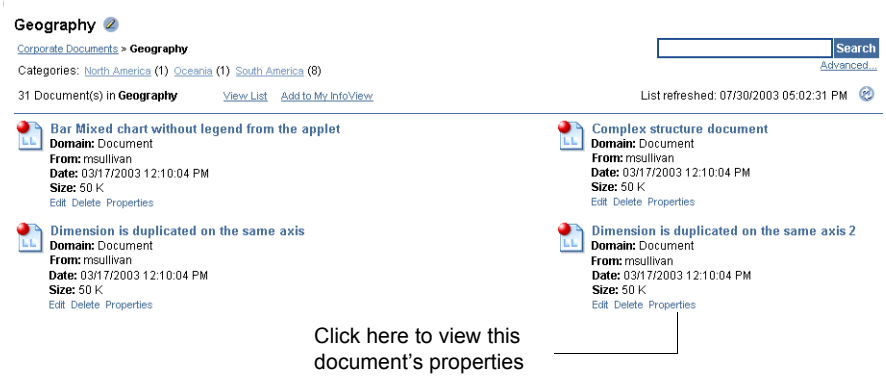
Viewing document properties via a document list

To view a document's properties:

1. Open the document list.

Welcome sglespen
BUSINESS OBJECTS
Home
My InfoView
Options
Help
Logout
Geography
Corporate Categories > Geography
Search
Advanced...
Categories: North America (1) Oceania (1) South America (3)
19 Document(s) in Geography View Details Add to My InfoView
List refreshed: 01/21/2004 03:49:59 PM
Name
From
Date
Size
Bar Mixed chart without legend from the applet mmaillar 11/19/2002 03:29:47 PM 22 K
Complex structure document mmaillar 12/26/2002 11:21:09 AM 18 K
Dimension is duplicated on the same axis mmaillar 11/20/2002 05:44:24 PM 11 K
Document mmaillar 01/16/2003 05:13:36 PM 14 K
Document for Full edition in dHTMLClient mmaillar 01/03/2003 01:03:21 PM 111 K
Document for Interactive Viewing demo mmaillar 08/18/2003 12:46:52 PM 79 K

2. Click **View Details**.
   The document list is displayed in detailed view.



The detailed view displays the following information:

- The document name
- A description of the document—if the sender/publisher entered one
- Document keywords—if the sender/publisher entered any
- The document's domain—if the document list you are viewing is either Corporate Documents or your inbox
- The sender/publisher of the document
- The date the document was created
- The document size

Viewing document properties via the Properties page

To view more information, from the details view shown above, click **Properties** for the appropriate document.

The Document Properties page appears.

In addition to the properties displayed in the document details view, the Properties pages also show:

- the document's ID
- the document's categories
- the document's data providers

NOTE

You can change the document categories if you have the rights to do so.

3. Click **OK** to save any changes you make, or **Close** to return to the document details view.

Managing Categories

chapter 9

Overview

This chapter defines what categories are, describes the different types of categories that are available in InfoView, and explains how to use them.

What are categories?

When the number of documents in your Corporate Documents and Personal Documents pages becomes too large to be easily manageable, you can assign documents to *categories* to make them easier to find.

Categories are a way of organizing documents. A category displays only the documents that have been assigned to it, rather than the entire list of documents that are available to you. This makes it easier to sort and find documents in document lists.

By creating categories that are appropriate to your business, you create a filing system, in which each category contains documents related to a certain aspect of your business, such as marketing, or sales. As a result, your list of documents becomes more manageable, because an individual document is easier to find.

TIP

If you find yourself using the Search facility often, it may be time to start assigning your documents to categories so that you can filter your document lists.

What kinds of categories are there?

InfoView has two kinds of categories:

- Corporate categories

  Corporate categories organize lists of corporate documents.

  To create corporate categories, you must be given the appropriate rights by your system administrator. With these rights, you can also update and delete any category that you have created.

  If you have the appropriate rights, you can also update and delete categories that other users have created.

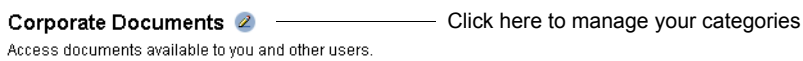
  For more information, refer to Managing corporate categories on page 143.
- Personal categories

  You use personal categories to organize your list of personal documents. You alone can create, update, delete, and use these categories.

  For more information, refer to Managing personal categories on page 149.

Accessing categories

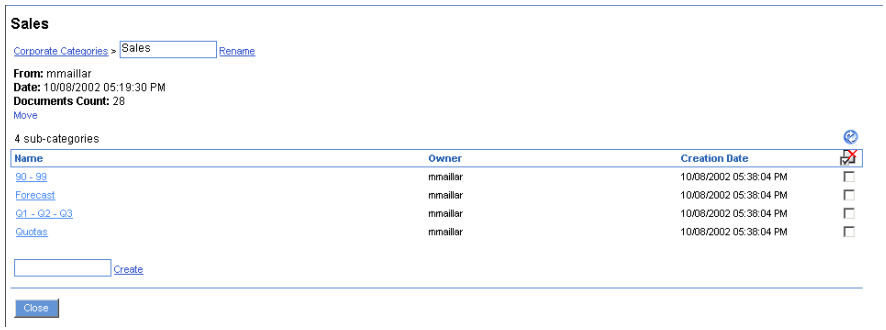
You access your categories from the Personal Documents and Corporate Documents pages by clicking the Manage Categories icon.



When you select one of the categories, InfoView displays category information such as:

- the category path
- user name of the owner of the category
- when it was last updated
- how many documents the category contains
- how many subcategories it contains

An example of category information is shown below.



Managing corporate categories

Corporate categories is the file system storage area in the Corporate Documents page.

In the Corporate Documents page, you can sort documents by creating categories and assigning documents to them. You can also create subcategories within these categories. You can assign a document to one or more of these categories and subcategories. This practice introduces the concept of *hierarchical categories*.

Introducing hierarchical categories

In previous versions of InfoView, users could associate documents in the Corporate Documents page with one or more categories. With this version, you can create subcategories within categories, and so create hierarchical categories. You can then associate a document with one or more of these categories or subcategories.

These categories can be displayed either as links at the top of the page, or as a standard, collapsible tree in a navigational panel called Corporate Home, to the left of the page.

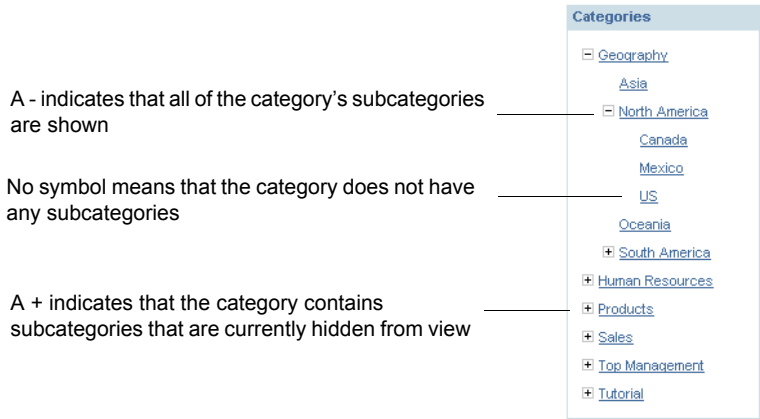
Hierarchical corporate categories displayed in the navigation panel

To see the documents assigned to a given category, simply click the category's name. If you want, you can save documents to one or more categories simultaneously.

Hierarchical categories have the following properties:

- A document can belong to several categories.
- Every category can have zero, one or several subcategories.
- All categories can contain documents.
- The hierarchy of categories constitutes a simple tree.

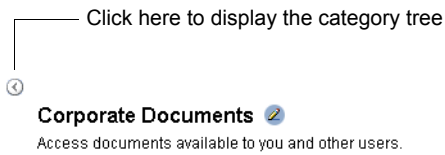
You can construct the categories with several levels, and a top level category can have subcategories. Corporate categories are organized into a tree menu and can be expanded and collapsed.



If you do not have access to any of the documents in a particular category, the category is not displayed.

Displaying hierarchical categories

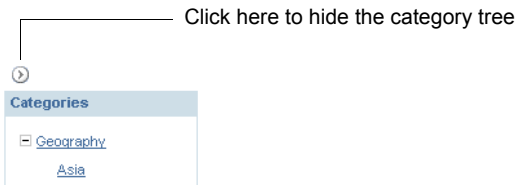
By default the category tree is hidden. When it is, a left arrow is displayed in the upper left corner of the page, above the name of the current category.



- To display the category tree, click this arrow.

Hiding hierarchical categories

When the category tree is displayed, the arrow above the tree points right.



- To hide the category tree, click this arrow.

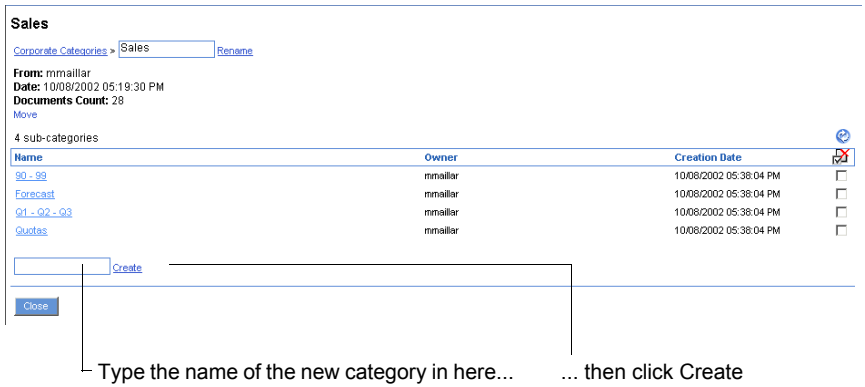
Creating a corporate category

You can create categories either directly in the Corporate Documents page, or within an existing category.

To create a corporate category:

1. From the Home page, click **Corporate Documents**.
   The Corporate Document page opens.
2. Select the category under which you want to create a new category (a subcategory).
   This can be the Corporate Documents Home page, or one of its subcategories.

3. Click the **Manage Categories** icon.
   The corporate categories list appears.

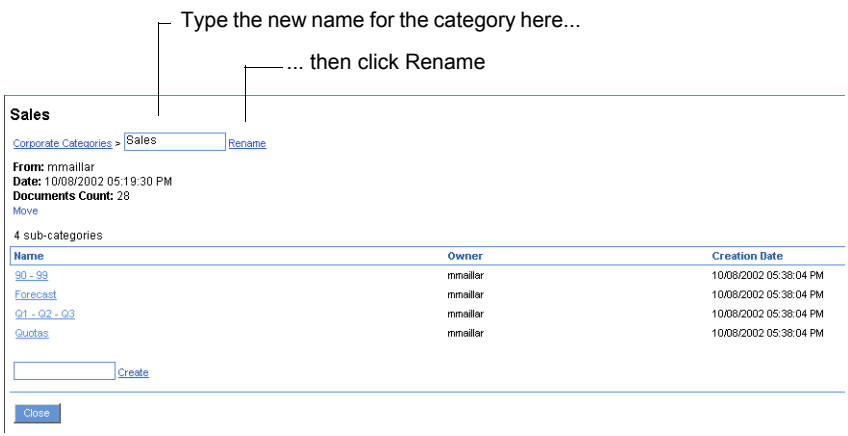


4. Type the name of the category you want to create in the text field at the bottom of the page.
5. Click **Create**.
   InfoView creates the category and adds it to the list.
6. Click **Close**.

Renaming a corporate category

To rename a corporate category:

1. From the Home page, click **Corporate Documents**.
   The Corporate Document page opens.
2. Select the category you want to rename—you cannot rename the home page.
   The categories list appears.

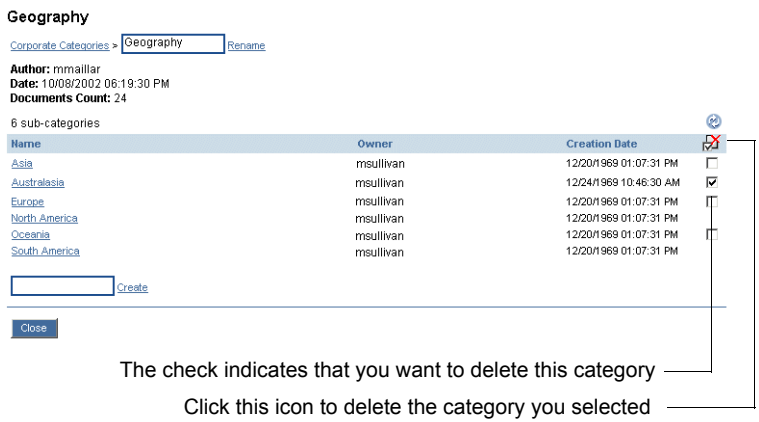


3. Type the new name for the category in the text field at the top of the page.
4. Click **Rename**.
   InfoView renames the category.
5. Click **Close**.

Deleting a corporate category

To delete a corporate category:

1. From the Home page, click **Corporate Documents**.
   The Corporate Document page opens.
2. Select the category you want to delete—you cannot delete the home page.
   The categories list appears.



3. Select the check boxes next to the name of the category or categories you want to delete.
4. Click the Delete Selected Categories icon shown above.
   The following confirmation message appears:

5. Click **OK**.
   InfoView deletes the category.
6. Click **OK** again.

NOTE

You cannot delete a category if it contains subcategories. You must delete each subcategory first.

Managing personal categories

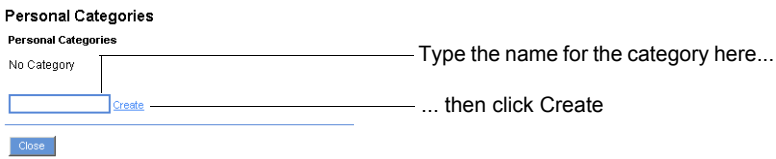
You alone have the right to create, rename, delete, and use these categories.

Creating a personal category

You can create personal categories only in the Personal Documents Home page—you cannot create subcategories.

To create a personal category:

1. From the Home page, click **Personal Documents**.
   The Personal Documents page opens.
2. Click **Manage Categories**.
   The personal categories list opens.

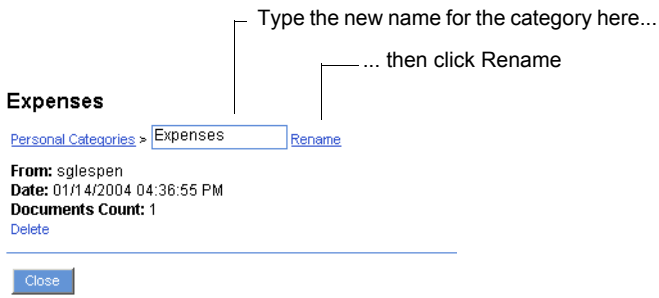


3. Type the name of the new category in the text field.
4. Click **Create**.
   InfoView creates the category and returns you to your personal categories list. The new category is displayed.
5. Click **Close**.

Renaming a personal category

To create a personal category:

1. From the Home page, click **Personal Documents**.
   The Personal Document page opens.
2. Select the category you want to rename—you cannot rename the home page.
   The categories list appears.



3. Type the new name for the category in the text field at the top of the page.
4. Click **Rename**.
   InfoView renames the category.
5. Click **Close**.

Deleting a personal category

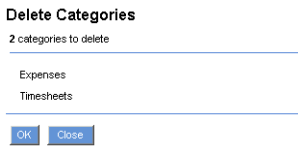
To delete a personal category:

1. From the Home page, click **Personal Documents**.
   The Personal Document page opens.
2. Click the Manage Categories icon next to the heading Personal Categories.

   The list of categories appears.
3. Select the category you want to delete—you cannot delete the home page.
   The categories list appears.
4. Select the check boxes next to the name of the category or categories you

want to delete.

5. Click the Delete Selected Categories icon shown above.
   The following confirmation messages appears.



6. Click **OK**.
   InfoView deletes the category.

Saving, Sending, and Scheduling Documents

chapter 10

Overview

This chapter explains how to save, send and schedule documents.

The Save section tells you how to:

- save a new document to Corporate Documents
- save a new document to Personal Documents
- save a document to My Computer

The Send section tells you how to send documents to other users.

The Schedule section tells you how to specify a time and date to refresh and send documents using the Broadcast Agent.

Saving documents

You save documents to InfoView by opening the document, then clicking **Save**.

You can save open documents to the following places in InfoView:

- Corporate Documents—to make documents accessible to other InfoView users.

  For more information, refer to Save as a corporate document on page 156.
- Personal Documents—to store a document in your personal storage area in InfoView.

  For more information, refer to Save as a personal document on page 160.
- My Computer—to copy a document to the computer you are currently working on.

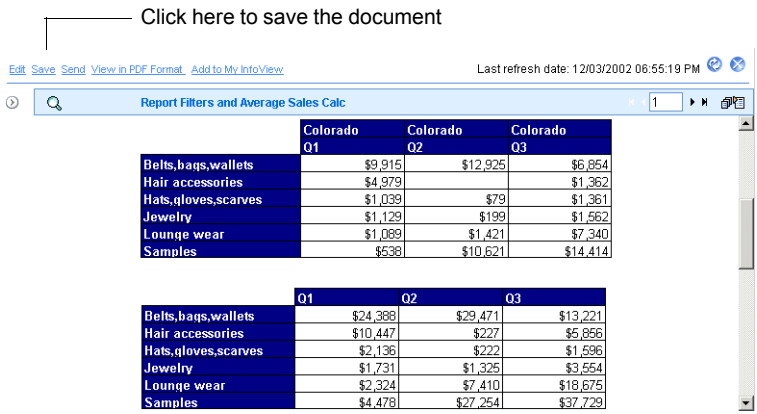
  For more information, refer to Save to my computer on page 162.

Save as a corporate document

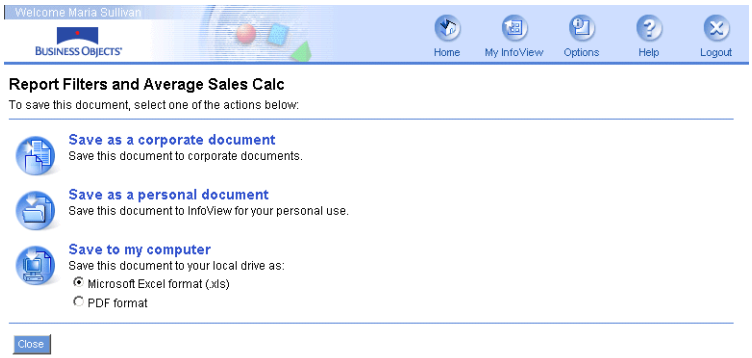
You can save any document type as a corporate document if you have the appropriate rights.

To save as a corporate document:

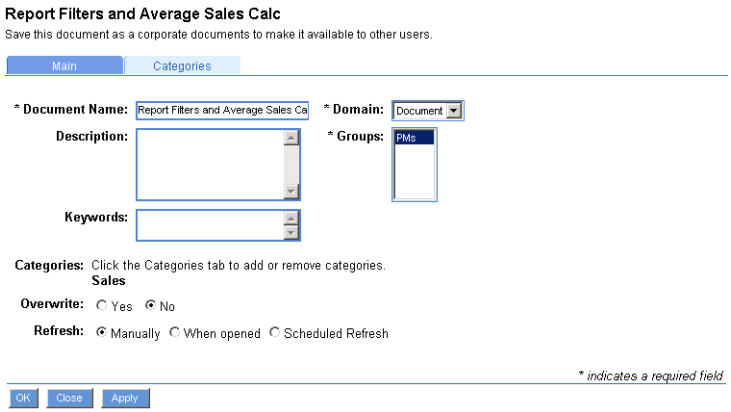
1. Open the document you want to save.
   The save option appears above the open document.


Click here to save the document
Edit Save Send View in PDF Format Add to My InfoView
Last refresh date: 12/03/2002 06:55:19 PM
Report Filters and Average Sales Calc
1
Colorado Q1
Colorado Q2
Colorado Q3
Belts,bags,wallets $9,915 $12,925 $6,854
Hair accessories $4,979 $1,362
Hats,gloves,scarves $1,039 $79 $1,361
Jewelry $1,129 $199 $1,562
Lounge wear $1,089 $1,421 $7,340
Samples $538 $10,621 $14,414
Q1 Q2 Q3
Belts,bags,wallets $24,388 $29,471 $13,221
Hair accessories $10,447 $227 $5,856
Hats,gloves,scarves $2,136 $222 $1,596
Jewelry $1,731 $1,325 $3,554
Lounge wear $2,324 $7,410 $18,675
Samples $4,478 $27,254 $37,729

2. Click **Save**.
   The save options page appears.



3. Click **Save as a corporate document**.
   The Save as a corporate document page displays the Main and Categories tabs:



4. In the Main tab, complete the following essential information:
   - Document name

   By default, the document's current name appears as the document's name. If you want to change it, do so in the text box.
   - Select a document domain in the corporate repository to send the document to.
   - Select the group or groups to which you want to make this document accessible.

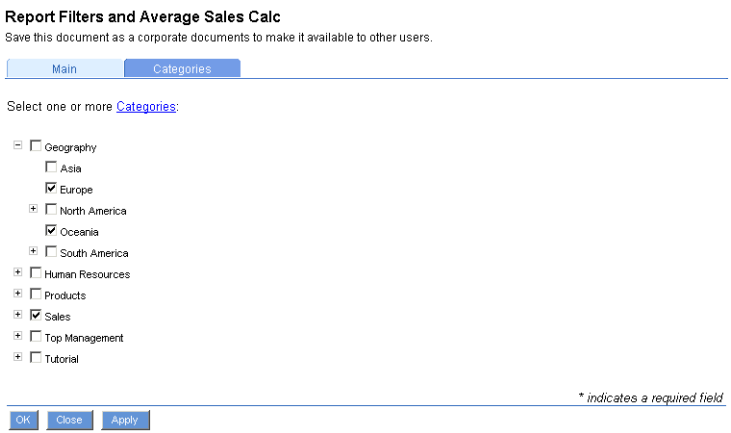
   Available groups are listed.
5. You can also enter the following information if required:
   - A description of the document
   - One or more keywords to serve as search criteria
6. Choose whether or not to overwrite documents of the same name and type when this document is saved, using the Overwrite option.

   If you choose not to overwrite, and another document exists with the same name, you must rename your document before you save it.
7. Choose when to refresh the document using the Refresh options.

Option	Description
Manually	The document will be refreshed only when a user refreshes it manually.
When opened	Whenever a user opens the document, InfoView automatically runs the document's query again, formats the document, and displays the document with the most up-to-date data, using the user's security profile.
Scheduled Refresh	Broadcast Agent automatically refreshes the document at specific times or intervals, then sends it to the users in your distribution list.

For more information, refer to Refreshing documents on page 108.

8. Click the **Categories** tab.
   The category tab opens showing all the corporate categories available to you.



9. Select the category or categories to which you want to save the document, then click **OK.**
   For more information, refer to Managing Categories on page 139.

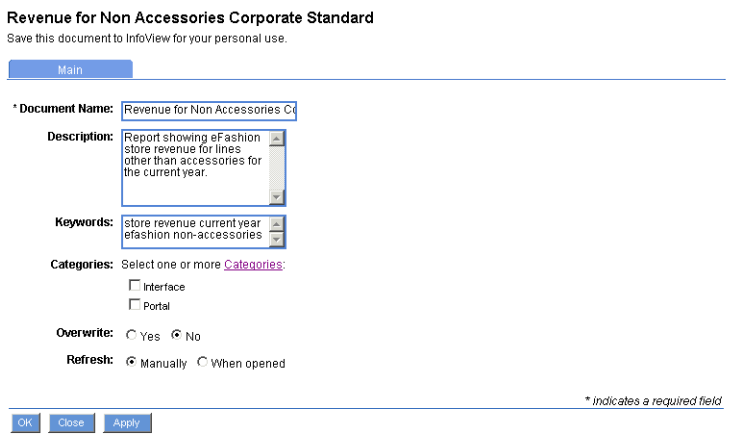
Save as a personal document

You can save any document type as a personal document.

When you save a personal document, you make a copy of the document and store it in your Personal Documents page. You can save any document that you have rights to read.

To save as a personal document:

1. Open the document you want to save.
   The save option appears above the open document.
2. Click **Save**.
   The save options page appears.
3. Click **Save as a personal document**.
   The Save as a personal document page displays the Main tab.



4. Enter the document's name.
   By default, the document's current name appears as the document's name. If you want to change it, do so in the text box.
   For best results, limit the name of the document to 100 characters.
5. You can also enter the following information if required:
   - A description of the document
   - One or more keywords to serve as search criteria
6. Select the category or categories to which you want to save the document.

NOTE

You can make changes to your personal categories, such as creating a new category to assign the document to. To do so, click **Categories**. For more information, refer to Managing Categories on page 139.

7. Choose whether or not to overwrite documents of the same name when this document is saved, using the Overwrite option.

   If you choose not to overwrite, and another document exists with the same name, you must rename your document before you save it.
8. Choose when to refresh the document using the Refresh options.

Option	Description
Manually	The document will be refreshed only when a user refreshes it manually.
When opened	Whenever a user opens the document, InfoView automatically runs the document's query again, formats the document, and displays the document with the most up-to-date data, using the user's security profile.

   For more information, refer to Refreshing documents on page 108.
9. Click **OK**.

Save to my computer

You can save documents of all types to your local machine.

The formats available to you when you do so depend on your rights and the document type. Available formats may include:

- The original document format, such as .rep for a BusinessObjects document.

  Saving BusinessObjects documents in their original format means that you can easily view the data as it was created. You can also edit the document if you have the right.
- PDF (.pdf)

  Creating a copy of your documents as a PDF file is especially useful if you want to provide other users with the document information in a printable format. The page layout and formatting of the document is retained in the PDF file.
- Microsoft Excel format (.xls)

  Creating a copy of your documents as a Microsoft Excel file is useful if you want to combine the information in your document with other data in an Excel spreadsheet, and send it to non-Business Objects users.

  Each report within the document converts to a separate Excel worksheet within the Excel file.
- Comma Separated Values format (.csv)

  Creating a copy of your documents in CSV format is useful for saving the information in your document in a generic format that can easily be imported into databases or spreadsheets.

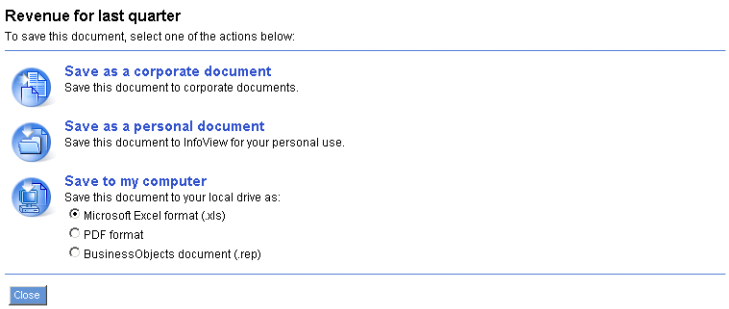
NOTE

Unlike BusinessObjects and WebIntelligence documents, Excel files cannot retrieve data from the database using InfoView. This means you cannot refresh their data. To display up-to-date data in Excel format, refresh the document and then save as a new Excel file.

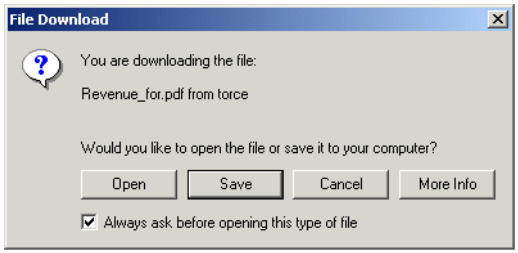
When you save a document to your computer, your browser may display an "unknown file" message and ask you if you want to open the file or save it to disk. Once you have made your selection, you are prompted to select the program to use to open the document.

To save a document:

1. Open the document you want to save.
   The save option appears above the open document.
2. Click **Save**.
   The save options page appears.


Revenue for last quarter
To save this document, select one of the actions below:
Save as a corporate document
Save this document to corporate documents.
Save as a personal document
Save this document to InfoView for your personal use.
Save to my computer
Save this document to your local drive as:
Microsoft Excel format (.xls)
PDF format
BusinessObjects document (.rep)
Close

3. Under the Save to my computer section, select a format.
   The options to save as Microsoft Excel and PDF are always shown. The option to save as a BusinessObjects document is shown only if the document you have selected is a BusinessObjects document.
4. Click **Save to my computer**.
   The File Download dialog box appears.


File Download
You are downloading the file:
Revenue_for.pdf from torce
Would you like to open the file or save it to your computer?
Open
Save
Cancel
More Info
Always ask before opening this type of file

5. Click **Save**.
6. Select a file location on your computer, then click **Save**.
   A copy of your document is saved in your chosen format to the location you specified on your local machine.
7. Click **Close**.

Sending documents

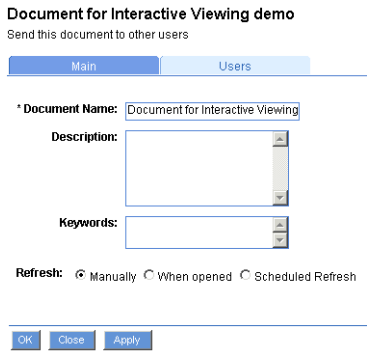
You can send a document to individuals or to groups of users.

To send a document:

1. Open the document.
2. Click **Send**.

Click here to send the document to someone else
Edit Save Send View in PDF Format Add to My InfoView
Document Map
Document for Interactive Viewing demo
2003
Mulit block
Revenue per State
Q2 Q3 Q4
Accessories $25,245 $32,894 $19,997
City Skirts $2,375 $4,927 $0
City Trousers Discontinued $1,033 $303
Dresses $11,681 $32,097 $10,618
Jackets $2,368 $3,429 $5,001
Leather Discontinued $1,175 $163
Outerwear $158 $2,828 $1,038

The Send page opens.



3. In the Main tab, complete the following essential information:
   - Document name

   By default, the document's current name appears as the document's name. If you want to change it, do so in the text box.
   - A description of the document
   - One or more keywords to serve as search criteria
4. Choose when to refresh the document using the Refresh options.

Option	Description
Manually	The document will be refreshed only when a user refreshes it manually.
When opened	Whenever a user opens the document, InfoView automatically runs the document's query again, formats the document, and displays the document with the most up-to-date data, using the user's security profile.
Scheduled Refresh	Broadcast Agent automatically refreshes the document at specific times or intervals, then sends it to the users in your distribution list.

   For more information, refer to Refreshing documents on page 108.
5. In the Users tab, complete the following essential information:
   - Select a document domain in the corporate repository where you will send the document.
   - A search feature is now available to select a group or groups. Enter one or more letters and click Search to find users. You may use the (*) wildcard and return the entire list of available users and groups.
   - Select the group or groups to which you want to make this document accessible.

NOTE

Users and groups cannot be viewed at the same time. As a result, you cannot select both users and groups in the same action. However, you may select one and then the other before sending your document.

6. Click **OK**.

   A confirmation message appears when the document has been successfully sent.

Refreshing

When you send a document, you also define how you want the document to be refreshed.

If your system administrator has given you the right, you can schedule documents to be automatically refreshed and re-sent to other users through Broadcast Agent. If you do not have the right to schedule documents or access Broadcast Agent, this option is hidden.

For more detailed information about Broadcast Agent, please refer to the *Broadcast Agent Administrator's Guide*.

Scheduling documents

If you have the rights, you can schedule a document when you choose one of the save or send options. When you schedule a document, means you specify a time and date to refresh it and send it using Broadcast Agent. You can also specify whether a certain file must be present for a task to begin. Broadcast Agent automatically refreshes documents at specific times or intervals, and re-saves them to the repository.

Broadcast Agent is a powerful BusinessObjects server product that allows InfoView and BusinessObjects users to refresh then send documents via the repository, an intranet, or the World Wide Web.

With InfoView, you can use Broadcast Agent to schedule any BusinessObjects or WebIntelligence document to be automatically refreshed at specific times, dates or intervals, then sent to users of your choice or the corporate repository.

To make sure you get the latest information, you can even send yourself the documents, then schedule automatic refreshes for them. Each time the documents are refreshed, they will automatically be sent to your inbox.

You can schedule document refreshes for off-peak times, for example at night, to reduce daytime network traffic.

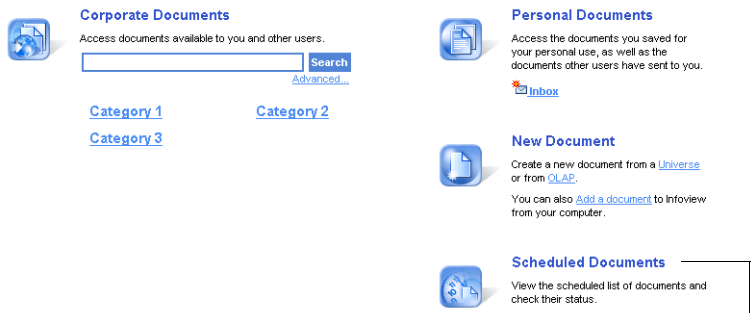
This section describes how to:

- view the list of documents you have scheduled
- schedule a document

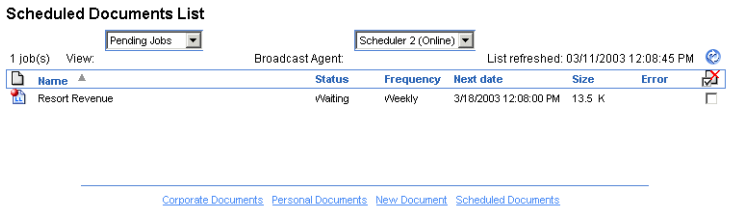
For more information about scheduling documents, refer to the *Broadcast Agent Administrator's Guide*.

Viewing your list of scheduled documents

If you have the appropriate rights, a Scheduled Documents link appears in the Home page:


Corporate Documents
Access documents available to you and other users.
Search
Advanced...
Category 1
Category 2
Category 3
Personal Documents
Access the documents you saved for your personal use, as well as the documents other users have sent to you.
Inbox
New Document
Create a new document from a Universe or from OLAP.
You can also Add a document to Infoview from your computer.
Scheduled Documents
View the scheduled list of documents and check their status.
Click here to view your list of scheduled documents

1. Click the Home icon.
   The Home page appears.
2. From your InfoView Home page, click **Scheduled Documents**.
   Your list of scheduled documents appears with their status.



Tasks in the Pending Jobs list can have the following status:

- running
- retrying
- delayed
- suspended

From here, you can:

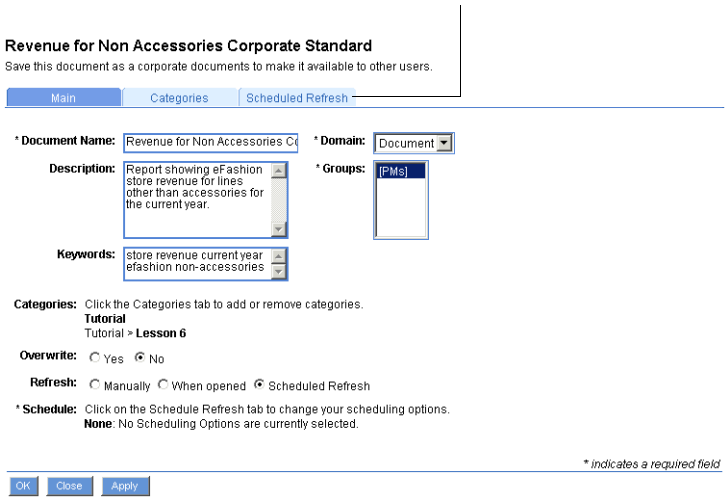
- Filter the documents on display to view all jobs, pending jobs, or failed jobs.
- View the documents scheduled using a different Broadcast Agent (if you have more than one).
- Delete scheduled documents from the list.

Scheduling documents

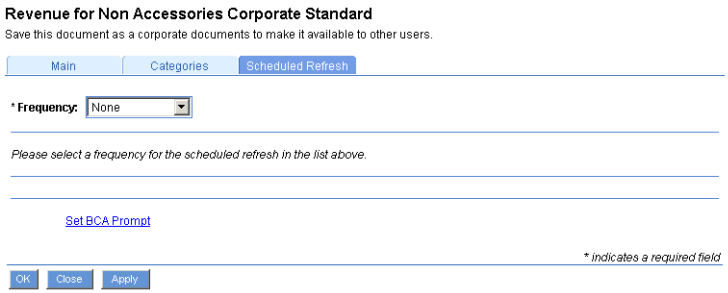
To schedule a document:

1. Follow the steps for either saving or sending a document, as described earlier in this chapter.
2. On the document's Main tab, select Scheduled Refresh.
3. The Scheduled Refresh tab appears.

The Scheduled Refresh tab



4. Click this tab.
   The following page appears:



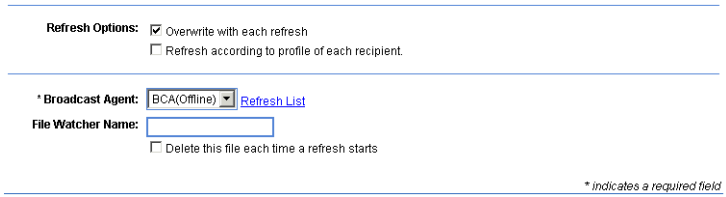
5. Choose the refresh frequency for the document, as described in the table below.

Frequency	Description
Once	Refreshes the document once only, on the specified date and at the specified time.
Hourly	Refreshes the document once an hour for the specified period of time.
Daily	Refreshes the document on one or more specified days of the week at a specified time, at weekly intervals.
Weekly	Refreshes the document on one day of week at a specified time.
Monthly	Refreshes the document on selected day of the month at a specified time.
Monthly Interval	Refreshes the document on selected day of the month at a specified time, at the monthly interval that you specify, such as every three months.
User Defined	Refreshes the document as and when you determine.

When you select a refresh frequency, the Scheduled Refresh page displays the appropriate fields for you to enter the schedule details.

6. For most of the refresh options, you must also specify the start date and expiration date.

   The page also displays some or all of the following fields, depending on the type of document you have chosen to schedule.



NOTE

Please note that with the exception of User defined, you cannot set an expiration time. By default, InfoView sets this at 12:00 AM.

7. Indicate whether or not to overwrite the existing file each time you refresh the document.

   You cannot use this option if you choose to refresh with each recipient's profile.
8. Indicate whether or not to refresh the document with each recipient's profile.
9. Select the Broadcast Agent to use to schedule the document.
10. If you want to use the File Watcher feature, enter the name of the file to watch for.

    For more information, refer to the *Broadcast Agent Administrator's Guide*.
11. If you choose to use the File Watcher, indicate whether or not to delete the file that was watched for each time a refresh starts.
12. Click **OK**.

Scheduling documents with prompts

To schedule documents with prompts:

1. Schedule your document as described above.
2. On the Scheduled Refresh page, click **Set BCA prompt**.
   The prompts page appears.
3. Specify the value(s) you want to use for the prompt(s).
4. Click Run Query.
5. The Scheduled Refresh page appears again.
6. Click OK.

For more information, refer to the *Broadcast Agent Administrator's Guide.*

Using Dashboards

chapter 11

Overview

This chapter explains how Application Foundation can now be used with InfoView to view dashboards within My InfoView.

Introduction to Application Foundation

Application Foundation comes with powerful analytic engines that help customers equip their business users with advanced analytics to make proactive decisions, based on constantly evolving business information.

Application Foundation includes ready-to-use dashboard components that allow easy development and deployment of management dashboards.

Users of these applications can add analytics and customize their views to provide personalized business insights. A business rules engine provides automatic real time alerts and actions that operationalize analysis for closed-loop optimization of any business process.

Application Foundation is tightly integrated with the BusinessObjects platform, making it a natural part of customer BI strategy. And applications built on BusinessObjects Application Foundation are automatically extranet- as well as intranet-ready.

Application Foundation enables you to rapidly build applications without programming. It is very extensible and can be customized to suit your needs. It also includes a catalog of predefined analytic techniques that you can adapt as required.

Application Foundation contains a set of powerful analytics which allows you to create your own dashboard or view. It is part of your Business Intelligence strategy and gives one view across all data.

Since it has a web interface, it can be deployed enterprise-wide over an intranet or extranet. Using a standard Java-compliant web browser from any internet connection, you can:

- analyze customers' behavior over time to determine their lifetime value. This is often a better indicator of their value than just measuring the value at a given time.
- respond in a very focused way to customer behavioral trends, resulting in higher customer retention.
- distribute your analyses to those that need it as trend reports or as a list of individual customers to target in a marketing campaign.

NOTE

For more information on Application Foundation concepts, please see the *Dashboard Manager User Guide*.

Getting started with Application Foundation

The InfoView with Application Foundation deployment is a new feature in this release. Application Foundation is no longer available as a stand-alone product and must be used in this deployment.

NOTE

This guide assumes that you have already installed Application Foundation. If this is not the case, please refer to the *Application Foundation Installation Guide*.

Logging into Application Foundation

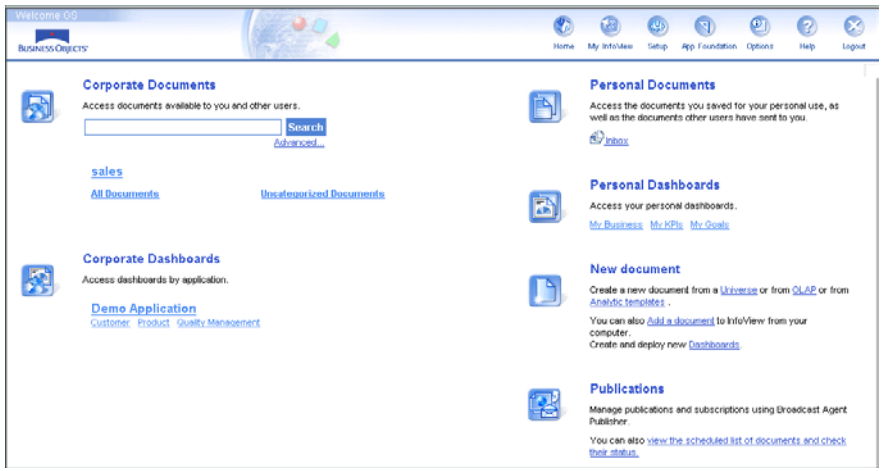
InfoView features a single login. Once you have logged into InfoView, you do not need to log into Application Foundation.

For information on logging into InfoView, refer to Logging into InfoView on page 31.

The Home page

The most noticeable change to InfoView when Application Foundation is deployed is in the InfoView Home page.

The InfoView Home page is shown below.


Welcome GS
BUSINESS OBJECTS
Home
My InfoView
Setup
App Foundation
Options
Help
Logout
Corporate Documents
Access documents available to you and other users.
Search
Advanced...
sales
All Documents
Uncategorized Documents
Corporate Dashboards
Access dashboards by application.
Demo Application
Customer Product Quality Management
Personal Documents
Access the documents you saved for your personal use, as well as the documents other users have sent to you.
Inbox
Personal Dashboards
Access your personal dashboards.
My Business My KPIs My Goals
New document
Create a new document from a Universe or from OLAP or from Analytic templates .
You can also Add a document to InfoView from your computer.
Create and deploy new Dashboards.
Publications
Manage publications and subscriptions using Broadcast Agent Publisher.
You can also view the scheduled list of documents and check their status.

When deployed with Application Foundation the Corporate Dashboards section appears underneath the Corporate Documents section.Corporate dashboards appear underneath the Corporate Documents section. In the right pane, Personal Dashboards is added to the standard InfoView sections. New Documents is modified to include Analytic templates. The InfoView toolbar remains the same.

- **Corporate Dashboards**

The Corporate Dashboards page is a catalog of all the dashboards that you are allowed to access in the corporate repository, the centralized BusinessObjects storage and distribution mechanism that manages universes, user information and document exchange.

- **Personal Dashboards**

The Personal Dashboards page lists the dashboards you have saved for your own personal use.

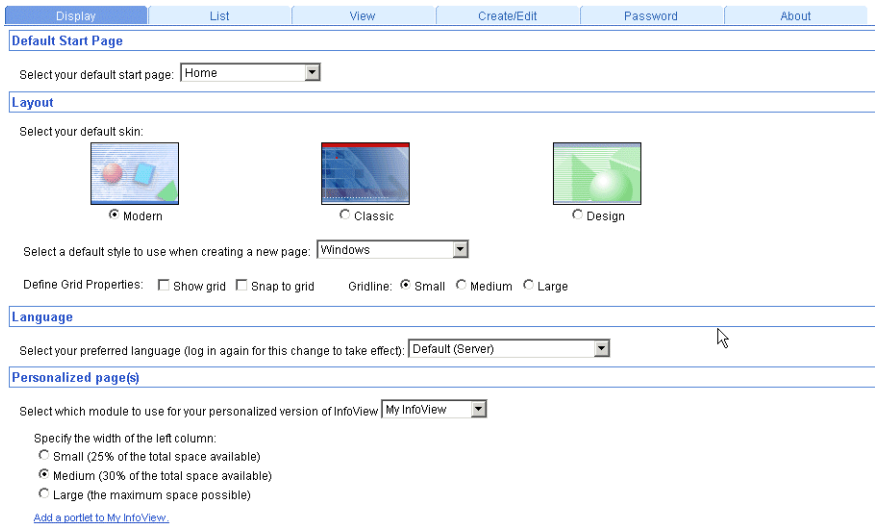
- **New Document**

The New Document page allows you to create a new document based on a template (Universe, OLAP or Analytic). You can also create and deploy new dashboards.

These lists not only keep you up to date with all the documents likely to impact your work, but provide you with the means to view, update and manage those documents. You can save documents for your personal use, send them to other users, and save them to the corporate repository for broader circulation.

The Options page

When Application Foundation is deployed, the Display and About tabs in the Options page in InfoView are slightly different.


Display
List
View
Create/Edit
Password
About
Default Start Page
Select your default start page: Home
Layout
Select your default skin:
Modern
Classic
Design
Select a default style to use when creating a new page: Windows
Define Grid Properties: Show grid Snap to grid Gridline: Small Medium Large
Language
Select your preferred language (log in again for this change to take effect): Default (Server)
Personalized page(s)
Select which module to use for your personalized version of InfoView My InfoView
Specify the width of the left column:
Small (25% of the total space available)
Medium (30% of the total space available)
Large (the maximum space possible)
Add a portlet to My InfoView.

The other tabs do not change when Application Foundation is deployed.

For more information on the standard InfoView Options page, refer to The Options page on page 42.

NOTE

These new features are not available when InfoView is used in a standard deployment without Application Foundation.

Default start page

The default start page down appears as a drop-down box instead of a radio button list.

The options are:

- Default
- Home
- My Personalized Page
- Corporate Documents
- Personal Documents
- Inbox
- Another page

The Default page is the same as is available for Application Foundation/ Dashboard Manager.

My Personalized Page can be either My InfoView or the Default page of My Dashboards.

For the Another page option, you can select a page from the Corporate Dashboard pages.

Layout

The Layout section contains the same three skins that are available in standard InfoView deployment.

There are three options that are available only when InfoView is deployed with Application Foundation:

- Select your default style sheet to use when creating new dashboards
- Define grid properties when building dashboards
- Size

The default style sheet option lets you select one of six different style sheets. By default, Windows is selected.

The grid properties option lets you define whether or not the grid will be displayed in your analytic.

The size option lets you define the size of the gridline.

Language

The Language section allows you to select any available installed language. This feature is the same in the standard InfoView deployment.

For more information on this option, refer to Display on page 43.

NOTE

InfoView now features a multilingual InfoView option. For more information, refer to Using the multilingual feature on page 32.

Personalized Pages

The Personalized Pages section lets you customize both My InfoView and My Dashboards. These two modules are available in InfoView with Application Foundation deployment. In standard InfoView deployment, only the My InfoView module is available.

For My InfoView, this section is the same as in standard InfoView deployment. For more information, refer to View on page 45.

For My Dashboards, you can select your default start page for going to My Dashboards:

- Default page
- My Dashboards page

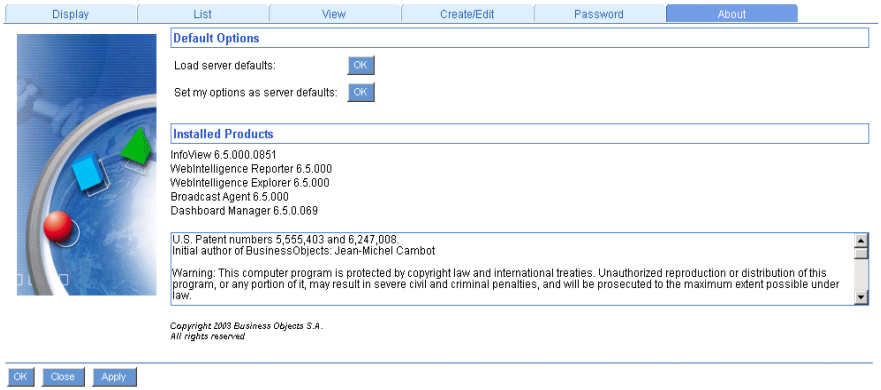
For My Dashboards page, you can select any available dashboards.

NOTE

By default, My InfoView is selected unless you have previously installed Application Foundation/Dashboard Manager and you have customized My Analytics.

The About page

A new option is available in the About page when InfoView is deployed with Application Foundation.


Display
List
View
Create/Edit
Password
About
Default Options
Load server defaults:
OK
Set my options as server defaults:
OK
Installed Products
InfoView 6.5.000.0851
WebIntelligence Reporter 6.5.000
WebIntelligence Explorer 6.5.000
Broadcast Agent 6.5.000
Dashboard Manager 6.5.0.069
U.S. Patent numbers 5,555,403 and 6,247,008.
Initial author of BusinessObjects: Jean-Michel Cambot
Warning: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
Copyright 2003 Business Objects S.A.
All rights reserved
OK
Close
Apply

You can now select the "Set my options as server defaults" in addition to "Load server defaults".

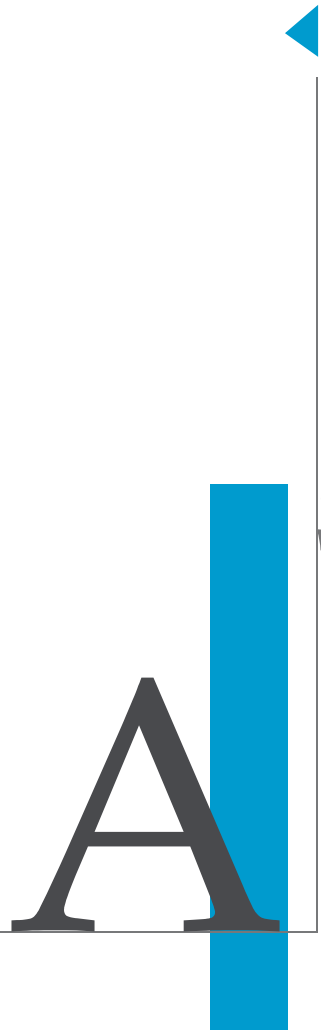
Using Application Foundation with InfoView

An extensive body of Application Foundation and Dashboard Manager document is currently available.

Business Objects recommends that you consult the following guides to help you use the InfoView with Application Foundation deployment:

- Dashboard Manager User's Guide
  This guide will help you understand the various concepts, tasks, and procedures required to use the Dashboard Manager.
- Set Analysis User's Guide
  This guide will help you perform simple to complex customer-related segment analysis from any Java-enabled Web browser that is connected to the Internet or a corporate intranet.
- Predictive Analysis User's Guide
  This guide will help you perform simple to complex customer-related segment analysis from any Java-enabled Web browser that is connected to the Internet or a corporate intranet.
- Performance Manager User's Guide
  This guide will help you .....
- Process Analysis User's Guide
  This guide will help you manage processes that influence the quality of your products and services; from product manufacturing, to call center responses, to invoice generation.
- Application Foundation Configuration & Deployment Guide
  This guide will help you understand the various concepts, tasks, and procedures required to use Application Foundation.
- Application Foundation Installation Guide
  This guide will help you install Application Foundation for deployment with InfoView. It is typically for system administrators who will be able to understand the technical aspects of Application Foundation.

Keyboard Shortcuts for Accessibility



Overview

This appendix describes the accessibility features for InfoView. It also explains the keyboard access shortcuts, using the tab key or a combination of keys, to navigate through InfoView. This appendix contains shortcuts for use with InfoView as well as for using JAWS or Adobe Reader with InfoView.

These shortcuts offer an alternative to using a mouse.

The keyboard options for creating and editing reports are located in Appendix B of the *Getting Started with WebIntelligence Guide*.

General Information

- InfoView and WebIntelligence have:
  - keyboard replacement of mouse actions
  - screen reader accessibility
  - high contrast colors
  - alternative descriptions for images
- Windows client and Internet Explorer Browser accessibility is supported.
- Charts are not available to screen readers. This includes bar, line, pie, volume, doughnut, polar, and simple scatter charts.

NOTE

The keyboard options for creating and editing reports are located in Appendix B of the *Getting Started with WebIntelligence Guide*.

Supported readers

Business Objects currently supports the following readers for 508 compliant InfoView:

- JAWS 4.5
- Adobe Acrobat 5.0 or later

Navigation Options in InfoView

- When following instructions using keyboard commands, replace the mouse actions by using the tab key to navigate to the correct HTML link, then pressing Enter.
- The skip link option can be activated on any InfoView page.
- In data tables the row and column headers are tagged so that they can be identified by assistive technology. Tables are read from left to right, top to bottom.

NOTE

For more information on navigation options, please see the *Building Reports Using the WebIntelligence HTML Report Panel* guide.

Logging into InfoView

Before logging into InfoView, you need to launch your web browser and open the InfoView login page.

Launching the log in page

1. Type the InfoView URL into the browser address bar.
   Your BusinessObjects administrator can provide you with the correct URL.
2. Press **Enter**.
   The InfoView log in page appears.

Shortcuts to log in

1. Press the **Tab** key until you reach the **Login** button.
2. Press **Enter.**
   Your cursor moves to the **Name** text box.
3. Type your user name.
4. Press the **Tab** key once.
   Your cursor moves to the **Password** text box.
5. Type your InfoView password.
   Your BusinessObjects administrator can provide you with the correct password.
6. Press **Enter**.
   The InfoView home page opens. You are ready to select the WebIntelligence HTML Report Panel as your document editor.

Logging out of InfoView

Once you have finished using WebIntelligence or InfoView you need to end your user session by logging out.

Log out of InfoView

1. Press the **Tab** key until you reach the Logout button on the InfoView toolbar.
2. Press **Enter**.
   The InfoView Logout page appears.
3. Press the **Tab** key until you reach the second **Logout** button near the end of the page.
4. Press **Enter**.
5. You are logged out of InfoView.

Navigating from frame-to-frame

The following table tells you how to navigate between the frames on the browser window and how to select each option within a frame.

If you want to...	use the following shortcut...
move to the next frame,	**Ctrl+Tab**
move to the previous frame,	**Ctrl+Shift+Tab**
select the next element within a frame,	**Tab**

NOTE

For more information on navigation options, please see the *Building Reports Using the WebIntelligence HTML Report Panel* guide.

Configuring JAWS

Screen reading software, such as JAWS, is used to read and navigate the InfoView interface as well as documentation.

To use assistive technology, such as Jaws, you need to contact your System Administrator to configure your computer system. Installing JDK 1.4 will not be sufficient.

Reading links

Business Objects uses tooltips in the HTML Report Panel to read crucial link descriptions.

In order to use these tooltips, you will have to configure JAWS to read and navigate links.

For information on configuring JAWS, please see:
http://www.freedomscientific.com/HTML_challenge/files/links_challenge.html

Third Party Shortcuts

The following section details information on the shortcuts available for third party applications used with Section 508 compliant InfoView.

JAWS Navigation Shortcuts

JAWS shortcuts are available for navigating InfoView.

Please see http://www.freedomscientific.com for specific shortcuts for using JAWS software on desktop or laptop machines with InfoView.

NOTE

JAWS software is currently only available for windows.

Adobe Navigation Shortcuts

Adobe Acrobat 5.0 shortcuts are available for navigating InfoView.

Please see http://www.adobe.com for specific shortcuts for using Adobe software with InfoView.

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